

| | |
|--|---|
| 1. Documentation | 4 |
| 1.1 User Manual | 4 |
| 1.1.1 Introduction to SmartAdvocate® | 7 |
| 1.1.1.1 Icons Used in SmartAdvocate | 7 |
| 1.1.1.2 About this Manual | 8 |
| 1.1.2 The SmartAdvocate Interface | 8 |
| 1.1.2.1 Navigating within SmartAdvocate | 8 |
| 1.1.2.2 Calendar | 9 |
| 1.1.2.3 Add/Edit Panels | 9 |
| 1.1.2.4 Tables | 9 |
| 1.1.2.4.1 How to sort using multiple columns on a grid | 9 |
| 1.1.3 Accessing SmartAdvocate® | 9 |
| 1.1.3.1 Logging In to SmartAdvocate® | 9 |
| 1.1.3.2 Logging out of SmartAdvocate® | 9 |
| 1.1.4 Quick Case Search | 9 |
| 1.1.4.1 By Case # / Plaintiff | 9 |
| 1.1.4.2 By Claim # | 9 |
| 1.1.4.3 By Date of Birth | 9 |
| 1.1.4.4 By Date of Incident | 9 |
| 1.1.4.5 By Defendant | 9 |
| 1.1.4.6 By E-mail Address | 9 |
| 1.1.4.7 By Phone # | 9 |
| 1.1.4.8 By License Plate # | 9 |
| 1.1.4.9 By Driver's License # | 9 |
| 1.1.4.10 By Policy # | 9 |
| 1.1.4.11 By Social Security # | 9 |
| 1.1.4.12 Search Results | 9 |
| 1.1.5 User Drop-down Menu | 9 |
| 1.1.5.1 Suggestions | 9 |
| 1.1.5.2 User Preferences | 9 |
| 1.1.5.2.1 How To Set Your 'Top Search' Defaults in User Preferences | 9 |
| 1.1.5.2.2 User Permission Groups | 9 |
| 1.1.5.3 Logout of SmartAdvocate® | 9 |
| 1.1.5.4 Change Password | 9 |
| 1.1.6 Recent Cases | 9 |
| 1.1.6.1 Overview | 9 |
| 1.1.6.2 Other Recently Accessed Cases | 9 |
| 1.1.7 Case Browse | 9 |
| 1.1.7.1 Search Criteria | 9 |
| 1.1.7.2 Case Browse Search Results | 9 |
| 1.1.7.3 Save and Add New Filter to Favorites | 9 |
| 1.1.7.4 Use Case Browse and Mass Update to Display Phone Number, SSN, DOB, etc. in Your Report | 9 |
| 1.1.7.5 Use Case Browse and Predefined Templates to Send Mass Communications to Clients | 9 |
| 1.1.8 Contacts | 9 |
| 1.1.8.1 Add New Contact | 9 |
| 1.1.8.2 Contact Card | 9 |
| 1.1.8.3 Contact Search Criteria | 9 |
| 1.1.8.4 Contact Search Results | 9 |
| 1.1.8.5 Contacts Video | 9 |
| 1.1.8.6 The 'Prevent Mailing' Feature in SmartAdvocate | 9 |
| 1.1.8.7 How to add client's signature to their contact card | 9 |
| 1.1.9 Dashboards | 9 |
| 1.1.9.1 Dashboards Overview | 9 |
| 1.1.9.1.1 Cases With Overdue Status' Dashboard | 9 |
| 1.1.9.1.2 Client Contact Overdue Dashboard and Report Overview | 9 |
| 1.1.9.1.3 Client Contact Overdue Dashboards and Reports | 9 |
| 1.1.9.1.4 Dashboard Designer | 9 |
| 1.1.9.1.5 Intake Performance Dashboard | 9 |
| 1.1.9.1.6 My Cases Dashboard | 9 |
| 1.1.9.1.7 Advertisement Campaigns Dashboard | 9 |
| 1.1.10 Office Calendar | 9 |
| 1.1.11 Tools | 9 |
| 1.1.11.1 Accounting | 9 |
| 1.1.11.1.1 Check Requests for Review | 9 |
| 1.1.11.2 Integrations | 9 |
| 1.1.11.2.1 Callers Info | 9 |
| 1.1.11.2.2 Case Intake Data | 9 |
| 1.1.11.3 Document Search | 9 |
| 1.1.11.3.1 Copy of Make use of the Documents and Notes Search features in SmartAdvocate | 9 |
| 1.1.11.4 Incomplete Cases | 9 |
| 1.1.11.5 Mass Document Upload | 9 |
| 1.1.11.6 Mass Emailing | 9 |
| 1.1.11.7 Mass Mailing | 9 |
| 1.1.11.8 Mass Mailing Export | 9 |
| 1.1.11.9 Mass Texting | 9 |
| 1.1.11.10 Mass Time Tracking Entry | 9 |
| 1.1.11.11 Notes Search | 9 |

| | |
|--|---|
| 1.1.11.11.1 Make use of the Documents and Notes Search features in SmartAdvocate | { |
| 1.1.11.12 Unassigned Documents | { |
| 1.1.11.13 Copy Merge Cases | { |
| 1.1.11.14 Time Tracking Review | { |
| 1.1.11.15 Import Case/Contact | { |
| 1.1.11.16 UDF Export | { |
| 1.1.12 Reports | { |
| 1.1.12.1 Reports Overview | { |
| 1.1.12.1.1 How to create a Referred-Out Firm Report using Case Browse | { |
| 1.1.12.1.2 How to search for cases using UDFs | { |
| 1.1.12.1.3 Make Use of the Client Contact Overdue Dashboards and Reports Video | { |
| 1.1.12.1.4 Medical Provider Referral Report | { |
| 1.1.12.1.5 The Settlement Forecast Report - Negotiations & Settlements | { |
| 1.1.12.1.6 Use The Staff Activity Report To Keep Track Of And Monitor Staff Productivity | { |
| 1.1.13 Project Details | { |
| 1.1.13.1 To create a New Project Detail | { |
| 1.1.14 Admin | { |
| 1.1.14.1 WorkPlans | { |
| 1.1.14.1.1 How to create a simple work plan to assign a task to multiple cases | { |
| 1.1.14.1.2 Workplan Assignments | { |
| 1.1.14.1.3 Item Templates | { |
| 1.1.14.2 Advertisement Campaigns | { |
| 1.1.14.3 Automated Procedure Management | { |
| 1.1.14.4 Case Menu Configurator | { |
| 1.1.14.5 Client Portal Administration | { |
| 1.1.14.6 Document Templates | { |
| 1.1.14.7 Email/Note/Appointment/View Templates | { |
| 1.1.14.8 Medical Record Request Types | { |
| 1.1.14.9 Notifications Setup | { |
| 1.1.14.10 Quick Injuries | { |
| 1.1.14.11 Refer-Out Rules | { |
| 1.1.14.11.1 Referral Law Firm Portal | { |
| 1.1.14.12 Stages Setup | { |
| 1.1.14.13 Status Setup | { |
| 1.1.14.13.1 Make use of Sub-Statuses in SmartAdvocate | { |
| 1.1.14.14 System Parameters (Internal) | { |
| 1.1.14.15 Text Message Templates | { |
| 1.1.14.16 Picklist Maintenance | { |
| 1.1.14.17 Case Types | { |
| 1.1.14.18 Retainer Staff | { |
| 1.1.14.19 System Parameters | { |
| 1.1.14.20 Task Groups | { |
| 1.1.14.21 Task Templates | { |
| 1.1.14.22 Template Pages Configuration | { |
| 1.1.14.23 UDF Editor | { |
| 1.1.14.24 Users | { |
| 1.1.14.24.1 How to replace a user in SmartAdvocate | { |
| 1.1.14.25 How To Set Your User Preferences for Email Notifications | { |
| 1.1.14.26 Tip of the Week | { |
| 1.1.15 Favorites | { |
| 1.1.15.1 Add Current Page to Favorites | { |
| 1.1.15.2 Generate Reports from the My Filters Panel | { |
| 1.1.15.3 Save Case Browse Search to your Favorites | { |
| 1.1.15.4 Manage Favorites | { |
| 1.1.16 My SmartAdvocate | { |
| 1.1.16.1 View My SmartAdvocate Screen of other Users | { |
| 1.1.16.2 My Appointments | { |
| 1.1.16.3 Critical Deadlines | { |
| 1.1.16.4 My Filters | { |
| 1.1.16.5 Tasks Assigned to Me | { |
| 1.1.16.6 My Cases (Cases Assigned to Me) | { |
| 1.1.16.7 Tasks Assigned By Me | { |
| 1.1.16.8 Cases with Overdue Status | { |
| 1.1.16.9 My Favorite Cases | { |
| 1.1.17 Case Pages | { |
| 1.1.17.1 General | { |
| 1.1.17.1.1 All Insurance | { |
| 1.1.17.1.2 All Vehicles | { |
| 1.1.17.1.3 Case Calendar | { |
| 1.1.17.1.4 Caption | { |
| 1.1.17.1.5 Client Portal | { |
| 1.1.17.1.6 Court Rules | { |
| 1.1.17.1.7 Court Screen | { |
| 1.1.17.1.8 Critical Comments | { |
| 1.1.17.1.9 Critical Deadlines Screen | { |
| 1.1.17.1.10 Disbursements | { |
| 1.1.17.1.11 Documents | { |

| | | |
|-------------|---|---|
| 1.1.17.1.12 | Emails Screen | 4 |
| 1.1.17.1.13 | Fees Awarded | 4 |
| 1.1.17.1.14 | Incident Screen | 4 |
| 1.1.17.1.15 | Investigations | 4 |
| 1.1.17.1.16 | Medical Testing | 4 |
| 1.1.17.1.17 | Negotiations/Settlement | 4 |
| 1.1.17.1.18 | Notes Screen | 4 |
| 1.1.17.1.19 | Photographs Screen | 4 |
| 1.1.17.1.20 | Shared Documents | 4 |
| 1.1.17.1.21 | Shared Forms | 4 |
| 1.1.17.1.22 | Social Security Disability | 4 |
| 1.1.17.1.23 | Retainer/Referral | 4 |
| 1.1.17.1.24 | Tasks | 4 |
| 1.1.17.1.25 | Timeline | 4 |
| 1.1.17.1.26 | UDF Pages | 4 |
| 1.1.17.1.27 | WorkPlans Screen | 4 |
| 1.1.17.2 | Plaintiff | 4 |
| 1.1.17.2.1 | Arb/Mediations | 4 |
| 1.1.17.2.2 | Adverse Exams | 4 |
| 1.1.17.2.3 | Attorneys | 4 |
| 1.1.17.2.4 | Complaints | 4 |
| 1.1.17.2.5 | Employment | 4 |
| 1.1.17.2.6 | Injuries | 4 |
| 1.1.17.2.7 | Injuries- Prior | 4 |
| 1.1.17.2.8 | Plaintiff Insurance | 4 |
| 1.1.17.2.9 | Lien Tracking | 4 |
| 1.1.17.2.10 | Medical Chronology | 4 |
| 1.1.17.2.11 | Medical Providers | 4 |
| 1.1.17.2.12 | Medical Providers- Prior | 4 |
| 1.1.17.2.13 | Other Providers | 4 |
| 1.1.17.2.14 | Prescriptions | 4 |
| 1.1.17.2.15 | Prior Claims | 4 |
| 1.1.17.2.16 | School/Other Activities | 4 |
| 1.1.17.2.17 | Special Damages | 4 |
| 1.1.17.2.18 | Vehicles | 4 |
| 1.1.17.3 | Defendant | 4 |
| 1.1.17.3.1 | Defendant Attorneys | 4 |
| 1.1.17.3.2 | Defendant Insurance | 4 |
| 1.1.17.3.3 | Defendant Notes | 4 |
| 1.1.17.3.4 | Defendant Vehicles | 4 |
| 1.1.17.4 | Litigation | 4 |
| 1.1.17.4.1 | Entries on Litigation Screen synced to the calendar | 4 |
| 1.1.17.4.2 | Appeals | 4 |
| 1.1.17.4.3 | Complaints/Answers | 4 |
| 1.1.17.4.4 | Depositions | 4 |
| 1.1.17.4.5 | Discovery | 4 |
| 1.1.17.4.6 | Evidence | 4 |
| 1.1.17.4.7 | Experts | 4 |
| 1.1.17.4.8 | Hearings | 4 |
| 1.1.17.4.9 | Motions | 4 |
| 1.1.17.4.10 | Outstanding Items | 4 |
| 1.1.17.4.11 | Trial Prep | 4 |
| 1.1.17.4.12 | Verdict | 4 |
| 1.1.17.5 | Probate/Surrogate | 4 |
| 1.1.17.5.1 | Will Information | 4 |
| 1.1.17.5.2 | Decedent Information | 4 |
| 1.1.17.5.3 | Distributees/Others | 4 |
| 1.1.17.5.4 | Letter of Administration | 4 |
| 1.1.17.5.5 | Death Compromise | 4 |
| 1.1.17.5.6 | Death Compromise Distribution | 4 |
| 1.1.17.6 | Other | 4 |
| 1.1.17.6.1 | All Contacts | 4 |
| 1.1.17.6.2 | Bankruptcy | 4 |
| 1.1.17.6.3 | Case Value | 4 |
| 1.1.17.6.4 | Custom View Pages | 4 |
| 1.1.17.6.5 | Funding | 4 |
| 1.1.17.6.6 | Member - MDL Cases | 4 |
| 1.1.17.6.7 | Other Cases | 4 |
| 1.1.17.6.8 | Time Tracking | 4 |
| 1.1.17.6.9 | VA Claims | 4 |
| 1.1.18 | Case Quick Action Tool Bar | 4 |
| 1.1.18.1 | Add Note | 4 |
| 1.1.18.2 | Add Quick Note | 4 |
| 1.1.18.3 | Add Phone Message | 4 |
| 1.1.18.4 | Add Appointment | 4 |
| 1.1.18.5 | Add Task | 4 |
| 1.1.18.6 | Add Multiple Tasks | 4 |

| | |
|---|---|
| 1.1.18.7 Send Text Message | 4 |
| 1.1.18.8 E-Mail | 4 |
| 1.1.18.9 Using Barcoding | 4 |
| 1.1.18.10 Create Funding Request | 4 |
| 1.1.18.11 Templates | 4 |
| 1.1.18.12 Attach | 4 |
| 1.1.18.13 Start/Stop Timer | 4 |
| 1.1.18.14 Retain | 4 |
| 1.1.18.14.1 How to Use the 'Retain' Button in SmartAdvocate | 4 |
| 1.1.18.15 Close | 4 |
| 1.1.18.16 Add to Favorites | 4 |
| 1.1.19 Miscellaneous | 4 |
| 1.1.19.1 Handling Contacts with Multiple Addresses | 4 |
| 1.1.19.2 Merge Codes | 4 |
| 1.1.19.3 The Funding Button in SmartAdvocate | 4 |
| 1.1.19.4 How To Use The SmartAdvocate App | 4 |
| 1.1.19.5 How To Use The SmartAdvocate App -10-23-20 | 4 |
| 1.1.19.6 Medical Provider - Bills Finalized and Don't Pay at Settlement Options | 4 |
| 1.1.19.7 How to associate a note with a party or contact in the case | 4 |
| 1.1.19.8 Use the 'Merged Facts' Field to Populate Your Pleadings | 4 |
| 1.1.20 Case Wizard | 4 |
| 1.1.20.1 Creating a New Case | 4 |
| 1.1.21 Plug-Ins | 4 |
| 1.1.21.1 SQL Configuration – Run SRegistry | 4 |
| 1.1.21.2 Install the SmartAdvocate Outlook Plugin | 4 |
| 1.1.21.3 WordMergeAddIn Plugin | 4 |
| 1.1.21.4 Word Template Editor Plugin | 4 |
| 1.1.21.5 Configuring Internet Explorer or Edge to Work with SmartAdvocate | 4 |
| 1.1.21.6 Configuring Google Chrome to Work with SmartAdvocate | 4 |
| 1.1.21.7 Installation of Plugins for SmartAdvocate Cloud | 4 |
| 1.1.21.8 Setting Up Barcode Scanning | 4 |

Documentation

Welcome to SmartAdvocate Documentation!

Table of Content

- [User Manual](#)
 - [Introduction to SmartAdvocate®](#)
 - [The SmartAdvocate Interface](#)
 - [Accessing SmartAdvocate®](#)
 - [Quick Case Search](#)
 - [User Drop-down Menu](#)
 - [Recent Cases](#)
 - [Case Browse](#)
 - [Contacts](#)
 - [Dashboards](#)
 - [Office Calendar](#)
 - [Tools](#)
 - [Reports](#)
 - [Project Details](#)
 - [Admin](#)
 - [Favorites](#)
 - [My SmartAdvocate](#)
 - [Case Pages](#)
 - [Case Quick Action Tool Bar](#)
 - [Miscellaneous](#)
 - [Case Wizard](#)
 - [Plug-Ins](#)
- [User Manual \(PDF\)](#)

User Manual

- [Introduction to SmartAdvocate®](#)
 - [About this Manual](#)
 - [Icons Used in SmartAdvocate](#)
- [Plug-Ins](#)
 - [SQL Configuration – Run SRegistry](#)
 - [Install the SmartAdvocate Outlook Plugin](#)
 - [WordMergeAddIn Plugin](#)
 - [Word Template Editor Plugin](#)
 - [Configuring Internet Explorer or Edge to Work with SmartAdvocate](#)
 - [Configuring Google Chrome to Work with SmartAdvocate](#)
 - [Setting Up Barcode Scanning](#)
 - [Installation of Plugins for SmartAdvocate Cloud](#)
- [The SmartAdvocate Interface](#)
 - [Calendar](#)
 - [Tables](#)
 - [Navigating within SmartAdvocate](#)
 - [Add/Edit Panels](#)
- [Accessing SmartAdvocate®](#)
 - [Logging In to SmartAdvocate®](#)
 - [Logging out of SmartAdvocate®](#)
- [Quick Case Search](#)
 - [By Case # / Plaintiff](#)
 - [By Claim #](#)
 - [By Date of Birth](#)
 - [By Date of Incident](#)
 - [By Defendant](#)
 - [By E-mail Address](#)
 - [By Phone #](#)
 - [By License Plate #](#)
 - [By Driver's License #](#)
 - [By Policy #](#)
 - [By Social Security #](#)
 - [Search Results](#)
- [User Drop-down Menu](#)
 - [Suggestions](#)
 - [User Preferences](#)
 - [Logout of SmartAdvocate®](#)
 - [Change Password](#)
- [Recent Cases](#)

- Overview
- Other Recently Accessed Cases
- Case Wizard
 - Creating a New Case
- Case Browse
 - Search Criteria
 - Case Browse Search Results
 - Save and Add New Filter to Favorites
 - Use Case Browse and Mass Update to Display Phone Number, SSN, DOB, etc. in Your Report
 - Use Case Browse and Predefined Templates to Send Mass Communications to Clients
- Contacts
 - Add New Contact
 - Contact Card
 - Contact Search Criteria
 - Contact Search Results
 - Contacts Video
 - The 'Prevent Mailing' Feature in SmartAdvocate
 - How to add client's signature to their contact card
- Dashboards
 - Dashboards Overview
- Office Calendar
- Tools
 - Integrations
 - Document Search
 - Incomplete Cases
 - Mass Document Upload
 - Mass Emailing
 - Mass Mailing
 - Mass Mailing Export
 - Mass Texting
 - Mass Time Tracking Entry
 - Notes Search
 - Unassigned Documents
 - Accounting
 - Copy Merge Cases
 - Time Tracking Review
 - Import Case/Contact
 - UDF Export
- Reports
 - Reports Overview
- Project Details
 - To create a New Project Detail
- Admin
 - Picklist Maintenance
 - WorkPlans
 - Advertisement Campaigns
 - Case Menu Configurator
 - Case Types
 - Client Portal Administration
 - Document Templates
 - Email/Note/Appointment/View Templates
 - Medical Record Request Types
 - Notifications Setup
 - Quick Injuries
 - Refer-Out Rules
 - Retainer Staff
 - Stages Setup
 - Status Setup
 - System Parameters
 - System Parameters (Internal)
 - Task Groups
 - Task Templates
 - Text Message Templates
 - UDF Editor
 - Users
 - How To Set Your User Preferences for Email Notifications
 - Automated Procedure Management
 - Template Pages Configuration
 - Tip of the Week
- Favorites
 - Manage Favorites
 - Add Current Page to Favorites
 - Generate Reports from the My Filters Panel
 - Save Case Browse Search to your Favorites
- My SmartAdvocate
 - View My SmartAdvocate Screen of other Users
 - My Appointments
 - Critical Deadlines
 - My Filters

- [Tasks Assigned to Me](#)
- [My Cases \(Cases Assigned to Me\)](#)
- [Tasks Assigned By Me](#)
- [Cases with Overdue Status](#)
- [My Favorite Cases](#)
- [Case Pages](#)
 - [General](#)
 - [Plaintiff](#)
 - [Defendant](#)
 - [Litigation](#)
 - [Probate/Surrogate](#)
 - [Other](#)
- [Case Quick Action Tool Bar](#)
 - [Add Note](#)
 - [Add Quick Note](#)
 - [Add Phone Message](#)
 - [Add Appointment](#)
 - [Add Task](#)
 - [Add Multiple Tasks](#)
 - [Send Text Message](#)
 - [E-Mail](#)
 - [Using Barcoding](#)
 - [Create Funding Request](#)
 - [Templates](#)
 - [Attach](#)
 - [Start/Stop Timer](#)
 - [Add to Favorites](#)
 - [Retain](#)
 - [Close](#)
- [Miscellaneous](#)
 - [Handling Contacts with Multiple Addresses](#)
 - [Merge Codes](#)
 - [Use the 'Merged Facts' Field to Populate Your Pleadings](#)
 - [The Funding Button in SmartAdvocate](#)
 - [How To Use The SmartAdvocate App](#)
 - [How To Use The SmartAdvocate App -10-23-20](#)
 - [Medical Provider - Bills Finalized and Don't Pay at Settlement Options](#)
 - [How to associate a note with a party or contact in the case](#)

Introduction to SmartAdvocate®

SmartAdvocate is the only case management software application developed, used, and continuously improved with new and updated features designed for greater productivity, by practicing attorneys and staff. SmartAdvocate enables your firm to integrate, organize, and access all of your case information and data, quickly and easily. Your attorneys and staff will be more productive. Your firm will become more efficient, and you will be in control of your practice.

SmartAdvocate gives you control of your practice by enabling you and your staff to efficiently integrate, organize, and access case information in a more productive way.

Created by a national law firm managing over 50,000 new case intakes per year, SmartAdvocate has been in design, production, and demanding daily use for over 15 years. Valuable feedback from experienced paralegals and attorneys from large national and local firms is implemented by our team of in-house, onsite developers - making SmartAdvocate the most practical case management application!

Previously available only in a server-based version, SmartAdvocate is now also available in a hosted cloud version. Both the cloud and server-based versions of SmartAdvocate are 100% browser-based, allowing you to securely access case information from any computer with Internet access. The application server and data can be located anywhere – even your office. SmartAdvocate's simple server, software and data updates eliminate the need for time consuming manual updates.

The cloud-based version of SmartAdvocate gives you the same accessibility without the need to purchase and maintain your own server. The software, along with your data, are hosted on our secure cloud server which is easily accessible by all your firm's users via the Internet.

Our iPhone/iPad and Android apps also allow you to access the system remotely, whether you are using either the cloud or server systems.

Icons Used in SmartAdvocate

SmartAdvocate uses icons to make it easier to perform various actions and to convey information in the system. There are many different icons across the various pages in SmartAdvocate, but some are more frequently used and/or are more important than others. The following is a partial list of the icons that appear in SmartAdvocate, loosely grouped according to their frequency and function.

Common Icons

Edit Icon



There are multiple versions of this icon, but they are all essentially the same. It is used in most of the tables in SmartAdvocate. Clicking it allows you to edit that row of the table.

Delete Icon



There are multiple versions of this icon (one of which is actually text, rather than an image), but they are all essentially the same. It is used in most of the tables in SmartAdvocate. Clicking it allows you to delete that row of the table. If a particular row does not have a delete icon, the information in that row is considered essential to one or more functions in SmartAdvocate and thus cannot be removed. In some instances, however, the row can still be edited to allow you to customize it to your needs.

Right-click Icon



This icon is used in many of the tables in SmartAdvocate. It generally serves to replace columns that contain numerous action icons. Clicking it (using either the right or left button of your mouse) opens a menu of actions that can be performed on that row of the table; additionally, if the icon is present, you can simply right-click anywhere in the row to open the same menu.

Adobe Export Icon



This icon is used in the tables in SmartAdvocate and allows for export to various file types. Clicking it exports the table to a PDF file.

Excel Export Icon



This icon is used in the tables in SmartAdvocate and allows for export to various file types. Clicking it exports the table to an .xls file.

Word Export Icon



This icon is used in the tables in SmartAdvocate and allows for export to various file types. Clicking it exports the table to a .rtf file, which can be read by Word and other popular Word processors.

Copy Icon



This icon is used in various locations in SmartAdvocate. It is generally used to copy information or record from one location to another.

Comment Icon



This icon is used in various locations in SmartAdvocate. It indicates the presence of a comment on the item with which it appears. Hover the mouse over the icon to view the comment or click the icon to view the comment.

History Icon



This icon is used in various locations in SmartAdvocate. Clicking it brings up a list with the details of any changes that have been made to the information contained in that row of the table.

About this Manual

This manual is designed to help you master SmartAdvocate's many features and capabilities. We strongly urge you to spend time familiarizing yourself with the system, its components, and features that are important to your practice and your role within the firm. It also provides valuable information that you can use to refresh initial learning and expand your knowledge of the system.

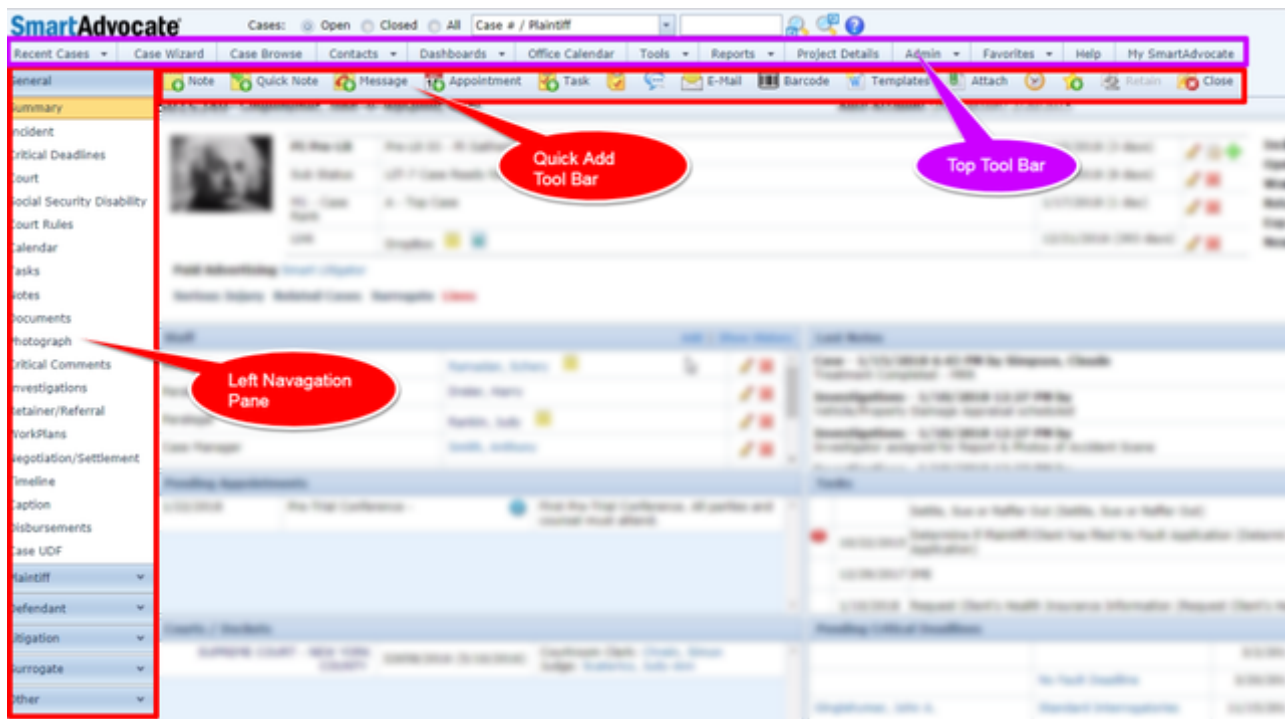
We are confident that if you invest the time to learn the workings of SmartAdvocate, you and your firm will greatly benefit. We designed SmartAdvocate to make **your** tasks easier to perform and **your** cases easier to manage. We trust that once you have learned the system, you will find this to be the case.

This manual has been almost completely overhauled from the previous version, which had been rendered partly obsolete by the rapid development and improvement of the SmartAdvocate system. Still, like SmartAdvocate itself, this manual is constantly being added to and refined, and we intend to include updates to the manual with each subsequent SmartAdvocate release. If you ever need information that should be in this manual but is not, or if you wish to suggest any updates or request any clarifications, please direct those queries to the Customer Support Department at support@smartadvocate.com. Whenever possible, we will attempt to provide you with a copy of any instructional material you request as soon as it is produced, regardless of when the next update will be released.

Images from SmartAdvocate are used throughout this manual. In most instances, the images are relatively small as you scroll through the manual, in order to save screen space. To view a larger version of the image, simply click on it. While enlarged, the image may cover some of the adjacent text of the manual. Clicking on the image again will cause it to revert to its original size.

The SmartAdvocate Interface

Navigating within SmartAdvocate



The Top Tool Bar is available on almost every screen throughout SmartAdvocate and enables you to use many of the most commonly accessed features with one click. The functionality and use of the individual buttons in the Top Tool Bar are discussed in detail in the various sections to which they apply.

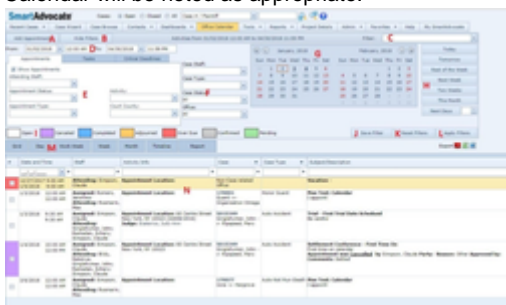
The Left Navigation Pane and Quick Action Tool Bar are available whenever an individual case is open. They will be discussed in detail within the appropriate portions of the Case Section of this manual.

Calendar

The Calendar is an essential tool for keeping track of upcoming appointments, tasks, and critical deadlines. This section will walk you through the display and functionalities that you are available for the Office Calendar in SmartAdvocate, which is an essential tool for keeping track of upcoming appointments, tasks, and critical deadlines.

The Calendar is used in two different parts of SmartAdvocate. One is the Office Calendar, accessed by clicking the Office Calendar heading in the Top Tool Bar. The Office Calendar can *display* any appointment, task, or deadline in the SmartAdvocate system; however, only non-case appointments can be *added* from the Office Calendar. You can, however, *view, edit, and otherwise work with* case related appointments, tasks, or deadlines from within the Office Calendar.

The second part of the Calendar is the Case Calendar. This is a case page [usually] located in the General section of the case view. The Case Calendar can only display appointments, tasks, and deadlines for a particular case. [Only appointments for that particular case can be added.] The Calendar interface and functionality is slightly different between the Office Calendar and the Case Calendar, distinctions between the Office Calendar and Case Calendar will be noted as appropriate.



The Structure of This Page

1. Add Appointment Button: Used to add a new appointment to the calendar. See [Adding an Appointment](#).
2. Show/Hide Filters Button: Used to remove or display the various filtering options on the page. See [Displaying Filters](#).
3. Favorite Filter Selector: Used to apply a saved favorite filter. See [Favorite Filters](#).
4. Range Selector: Used to set the date range for viewing calendar items. See [Setting the Date Range](#).
5. Calendar Item Type Tabs: Used to select which, if any, appointments, tasks, and critical deadlines should appear in the calendar results. See [Setting the Calendar Item Filters](#).
6. Case Attribute Fields: Used to limit the calendar results to those associated with particular cases, based on the attributes of the cases. This element only appears in the Office Calendar, not in the Case Calendar. See [Setting the Case Attribute Filters](#).
7. Date Widget: Used to set the date range for viewing calendar items. See [Setting the Date Range](#).
8. Date shortcut Buttons: Used to quickly set common date ranges and display calendar results. See [Setting the Date Range](#).
9. Color Key: Provides a reference for the color-coding scheme of calendar items. See [Color-Coding](#).
10. Save Filter Button: Adds a new favorite filter representing all of the currently applied filter criteria. See [Favorite Filters](#).
11. Reset Filters Button: Clicking this button removes all selected filter criteria, returning all filters to their defaults.
12. Apply Filters Button: Used to implement the currently selected filter criteria. See [Favorite Filters](#).

- Calendar Display **Buttons**: Used to select different display formats for the calendar results. See [The Calendar Results](#).
- Calendar Results **Display**: Displays the calendar results in the selected format. See [The Calendar Results](#).

Adding an Appointment

To Add a New Appointment:

- Click the Add Appointment button. This will bring up a New Appointment panel for you to input information; some fields will be filled by default. In the Case Calendar, the panel will display the case number, name, type, and sub-type in the upper left corner. In the Office Calendar, the panel will display the text, "Not Case Related."
- Fill the fields in with your desired information. See the Add/Edit Appointment Panel for details about the fields.
- Click Save to save the appointment and close the panel.
 - If you decide you do not wish to save the appointment, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Displaying Filters

You may choose to hide the calendar filtering tools. This has no effect on the filters themselves (any applied filters will continue to apply until you change them) but will free up some screen space for the results. The Case Calendar has the filters **hidden** by default; the Office Calendar does not. Click the Show/Hide Filters button when the filters are displayed to hide them, or when the filters are hidden to display them. The text on the button changes depending on whether the filters are displayed or hidden.

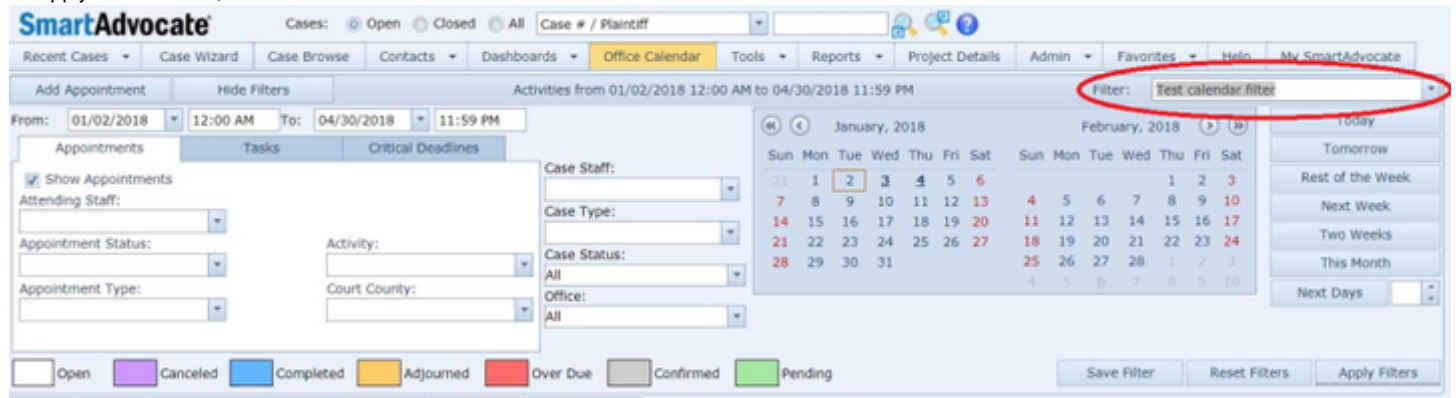
Favorite Filters

You may save a filter that you can reuse later. The date range will be saved relative to the current date; e.g., if the range is from the current date to two days in the future when the filter is saved, then on the date it is reused the range will be from that date to two days from that date. The time is saved as an absolute; no matter what time it is when the filter is saved or reused, the times in the range will be the same as they were in the saved filter. If a filter was saved in the Office Calendar, it may be used in the Case Calendar, and vice versa; however, any entries in the fields that are absent in the Office Calendar will be ignored when using the filter in the Case Calendar.

You can also set a filter as the default filter. Doing so will cause the filter to be applied automatically every time you open the Calendar. After the filter is applied, you can still edit the fields or reset the filter entirely if you wish. You can save as many filters as you want, however you can only set one filter as the default; if a filter is already set as the default, setting a different filter as the default will remove the default setting from the previous default. To save a filter:

- Click the Save Filter button. This will bring up a small panel. If you are already using a saved filter, that filter's attributes (the filter's name and whether it is the default) will be entered in the panel.
- Fill the fields in as desired. There are two: a required Text input field for the filter's name and a checkbox for whether the filter is the default filter.
- Click OK to save the filter and close the panel.
 - If you decide you do not wish to save the filter, click Cancel instead of clicking OK to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

To apply a saved filter, select the name of the desired filter from the Filter selector.



Setting Filter Criteria

In the Office Calendar, there are three groups of filter criteria that can be used to determine what items appear in the results: the date range fields, the calendar item fields, and the case attribute fields. In the Case Calendar, the case attribute fields do not appear, so the only groups of filter criteria are the date range fields and the calendar item fields.

Setting the Date Range

The date range is determined by the fields in the range selector. There are four fields: a **Date-widget drop down** and a Formatted text input field for the start date and time of the range, and another such pair for the end date and time. The only way to change the start or end time of the range, other than by using one of your **Favorite Filters**, is by editing them directly as you would most other editable fields. The date fields, however, can be changed in several different ways.

One way is to edit them directly.

Another way is to use the Modified Date widget. This widget shows two months at a time instead of just one, and any date that would contain at least one result based on the calendar item fields and case attribute fields, is underlined and in bold. There are a few ways to use the widget to change the date range. You can click on any date in the widget to set that date as both the start and end date. You can click a date and, holding the mouse button down, drag the mouse to an earlier or later date to set the earlier of the two dates as the start date and the later of the two as the end date. You can also click a

date, then hold the Shift key down and click another date to set the earlier of the two dates as the start date and the latter of the two as the end date. The Shift-key method is slightly more versatile than dragging the mouse, because you can click the first date, then use the widget's page-forward or page-backward buttons to change the displayed month in the calendar, then finally shift-click the second date, allowing you to set a range of any length you wish.

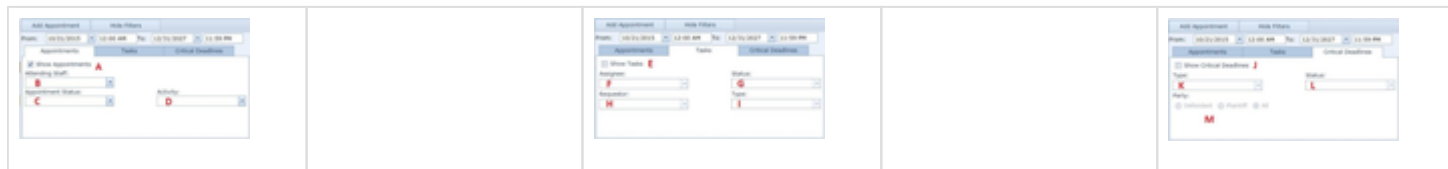
A third way is to use one of the date shortcut buttons. These provide preset and commonly used ranges that you can apply with one click. Clicking any of these buttons will both change the date range and immediately refresh the calendar results to reflect the new filters. The date shortcuts, and the ranges they set, are as follows:

1. Today: sets the start and end dates to the current date.
2. Tomorrow: sets the start date to the current date, and the end date to one day later.
3. Rest of the Week: sets the start date to the current date, and the end date to the following Saturday (or to the current date, if it is currently Saturday).
4. Next Week: sets the start date to the first Sunday after the current date, and the end date to the following Saturday
5. Two Weeks: sets the start date to the current date, and the end date to one week after the following Sunday (or to one week after the current date, if it is currently Sunday).
6. This Month: sets the start date to the first day of the current month, and the end date to the last day of the current month.
7. Next Days: sets the start date to the current date, and the end date to a number of days later equal to the number you insert into the associated Numeric input field.

Setting the Calendar Item Filters

The Calendar Item fields allow you to set which types of events you wish to see in the calendar results. The categories of items that can be displayed in the results are appointments, tasks, and critical deadlines (which include statutes of limitations). The Calendar Item fields are divided into three tabs, one for each category, and only one tab is visible at a time. Click the heading of the tab you want to access to bring up that tab's contents.

Each tab has one [Checkbox](#) field which sets whether that category is visible in the results at all, and some additional fields that set limits on which results in that category appear. If the checkbox in any tab is not selected, then none of the other fields in that tab are editable. Any [Checkbox-select](#) drop down field that is left blank is ignored and does not limit the results. The available fields are as follows:



Appointments:

1. Show Appointments: Checkbox determines whether appointments should be displayed in the results.
2. Attending Staff: [Checkbox-select](#) drop down; an appointment must have at least one staff member chosen to be displayed.
3. Appointment Status: [Checkbox-select](#) drop down; a status must be chosen for the appointment to be displayed.
4. Activity: [Checkbox-select](#) drop down; an appointment activity must be chosen for the appointment to be displayed.

Tasks:

1. Show Tasks: checkbox determines whether tasks should be displayed in the results.
2. Assignee: [Checkbox-select](#) drop down; a task must be assigned to a staff member to be displayed. By default, a task is assigned to the user who created it.
3. Status: [Checkbox-select](#) drop down; a status must be chosen for the task to be displayed.
4. Requester: [Checkbox-select](#) drop down; the requester must be chosen for the task to be displayed. By default, the creator of a task is set as the requester.
5. Type: [Checkbox-select](#) dropdown; a task category must be chosen for the task to be displayed.

Critical Deadlines:

1. Show Critical Deadlines: checkbox determines whether critical deadlines should be displayed in the results.
2. Type: [Checkbox-select](#) drop down; a category must be chosen for the critical deadline to be displayed.
3. Status: At least one status for the critical deadline or SOL must be chosen in order for the critical deadline to be displayed, whether a deadline is overdue. Critical deadlines may have multiple statuses; a critical deadline is always either open or complied, and the superseded and waived statuses are applied in addition to the open/complied status.
4. Party: Radio button; if All is not selected, the party subject to the deadline must be the selected party for the deadline to be displayed.

Setting the Case Attribute Filters

The Case Attribute fields allow you to limit the items that appear in the results to those connected to cases with certain attributes. These fields do not appear in the Case Calendar, because the items that appear in the Case Calendar results are already limited to the ones from that case. Any [Checkbox-select](#) drop down field that is left blank is ignored and does not limit the results. The available fields are as follows:



1. Case Staff: [Checkbox-select](#) drop down; if one or more staff members are chosen, at least one of those staff members must be on the item for it to be displayed. If none are chosen, the results will not be limited by this attribute.
2. Case Type: [Checkbox-select](#) drop down; if one or more case types are chosen, the case must have at least one of those case types for it to be displayed. If none are chosen, the results will not be limited by this attribute.
3. Case Status: Drop down, which allows the choice of Open, Closed, or All. The default selection is All; if All is not selected, a case must match the selection in this field to be displayed. Items that are not connected to any case will not be filtered out unless Closed is selected.

- Office: Drop down; if All is not selected, the case an item is connected to must be associated with the office selected in this field for that item to be displayed. Items that are not connected to any case will not be filtered out regardless of the selection in this field. The default selection is All.

Applying the Filters

In most cases, setting filter criteria does not immediately apply those criteria to the calendar results. Only certain buttons trigger the SmartAdvocate system to actually apply the selected criteria. Pressing any of these buttons will immediately update the results to reflect the selected criteria.

To update the results by other filters, click the Apply Filters button. Clicking the Apply Filters button will simply apply the selected filters without changing anything else about them or about the calendar view, and in most cases, this is the method you should use.



Any of the date shortcut buttons will also apply the selected filters. However, these also change the selected date range, so they are only useful if you want to apply one of the date ranges that the date shortcut buttons can implement.

Any of the Calendar Display buttons will apply the filters. This includes the date selection tool within the calendar results. However, these also change the way the calendar is displayed, so they are only useful if you also want to change to a different view. Also note that the Report button will not apply the new filters in the current calendar view, but the report it generates will reflect the new filters.

Finally, using any of the table tools that affect the displaying of results, such as column sorting and pagination, will apply the filters. It is generally recommended that you avoid applying new filters using one of the table tools, because it can be confusing. The option is only mentioned here to ensure that you are aware it is possible, and so that you are not confused if it occurs.

The Calendar Results

The items in the calendar can be displayed in a number of ways. There are several categories that describe the ways the calendar can be displayed: as a table (grid), as a daily calendar, as a work week calendar, as a weekly calendar, as a monthly calendar, as a timeline, and as a report.

Color-Coding

Except for the report, each of the calendar display options use a color-coding system to indicate, at a glance, the status of calendar items. A key for the color-coding system can be found above the calendar display buttons; however, this key only applies to appointments.

The color codes for tasks are as follows:

- White: Not Started.
- Blue: Completed.
- Purple: Canceled.
- Green: In Progress (Pending).
- Red: Overdue (not an actual status; applied to Not Started and In Progress tasks due in the past).

The color codes for deadlines are as follows:

- White: Open.
- Blue: Complied. Takes precedence over Superseded and Waived.
- Yellow: Superseded.
- Purple: Waived. Takes precedence over Superseded.
- Red: Overdue (not an actual status; applied to Open deadlines due in the past).

Table Results

To display the calendar as a table, click the Grid button in the calendar display buttons. Each row of the table represents an individual appointment, task, or critical deadline. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

The table contains the following columns:

| Grid | Day | Work Week | Week | Month | Timeline | Report |
|--------------------------|---|---|--|---|--------------------|--|
| # A | Date and Time B | Staff C | Activity Info D | Case E | Case Type F | Subject/Description G |
| <input type="checkbox"/> | 1/2/2018 - Due | Attorney: Ramadan, Schery Paralegal: , | Critical Deadline: Control Date Party: Defendant | 170007 Smith, Anthony -v- Doe, John | Xarelto - Boisvert | Control Date(1-0-0) |
| <input type="checkbox"/> | 1/2/2018 - Due | Attorney: Rosmarin, Max Paralegal: , | Critical Deadline: Last Date for Settle Judgment Party: Plaintiff | 6062 Ironfist, Nicolai -v- Doe, John | Lottery | Last Date for Settle Judgment Critical Deadlines for Motion Orders |
| <input type="checkbox"/> | 1/3/2018 12:00 AM - 12:00 AM | Assigned: Romero, Jeronimo Attending: Rosmarin, Max | Appointment Location: | 170001 Guard -v- Organization Omega | Honor Guard | Max Test: Calendar I appoint! |
| <input type="checkbox"/> | 1/3/2018 - Due 1/10/2017 - Completed | Assignee: Rosmarin, Max Requestor: , Case Staff: Romero, Jeronimo | Task Priority: Normal | 170001 Guard -v- Organization Omega | Honor Guard | Max Test: State (I... task, I guess.) Max Test: State (I... task, I guess.) |

- #: Checkbox selector; if you check multiple boxes for the *same type of activity* and then right-click, you can then choose among several actions (mark completed, adjourn, cancel, etc.), which will apply to all of the checked items. This function is only available if all of the items you have chosen are of the same type (Appointments, Tasks, Critical Deadlines, or Statutes of Limitation). The Color-Coding for the item's status is the background color of this column. If you choose items of different types and then right-click, a message will pop up advising that "Mixed activities" have been selected and no additional actions will be available.

2. Date and Time: Data (text) entry. For appointments, the start date, start time, end date (if different from the start date), and end time of the appointment. For tasks and deadlines, the due date of the item and the date it was complied with or completed.
3. Staff: Data (text) entry. For appointments, the lead attorney on the case and the contacts attending the appointment. For tasks, the staff member assigned to perform the task, the staff member who assigned the task, and the lead attorney on the case. For deadlines, the lead attorney on the case and the paralegal on the case.
4. Activity Info: Data (text & contact-card link). For appointments, the contact at whose address the appointment takes place, the location of the appointment, the judge overseeing the appointment (if appropriate), and the court information related to the appointment (if appropriate). For tasks, the priority level of the task. For deadlines, the type of the deadline and the party subject to the deadline.
5. Case: Data (text & case summary link). The number and name of the case to which the item is connected. In the Office Calendar for Personal or Non-Case related appointments, an indication that the appointment is "Non-case related". This column does not appear in the Case Calendar.
6. Case Type: Data (text). The case type of the case the item is connected to, if any. This column does not appear in the Case Calendar.
7. Subject/Description: Data (text). For appointments and deadlines, the subject and comments of the item. For tasks, the subject and description of the item.

For adjourned appointments, this column also includes the adjournment details (the new appointment dates and times, the staff member who entered the adjournment, the contact who requested the adjournment, the reason for the adjournment, the contact who approved the adjournment, and any comments on the adjournment).

Hour-by-Hour (Daily and Weekly) Calendar Results

To display the calendar in an hour-by-hour format, where the placement of each item exactly corresponds to the start and end time of the item, click the Day or Work Week button in the calendar display buttons.



The Day display is an hour-by-hour listing of any single day's items, while the Work Week display is an hour-by-hour listing of the items in a five-day period from Monday to Friday of any week. Other than the number of days displayed, there are no significant differences between the two settings.

The displays divide the day into increments of a specified length. By default, this is a half-hour; to change the increment size, right-click in a blank part of the calendar and select the desired increment size. Items in the calendar appear as blocks, sized and placed according to their start to end times. The blocks align with the selected increments exactly, even if the times of the item do not; a block's top border is the mark at or immediately earlier than the item's start time, and the block's bottom border is the mark at or immediately after the item's end time. The exception are items whose start and end times are identical; in particular, tasks and critical deadlines, which do not have times that can be manually specified, are listed as though they were appointments of zero length. This yields blocks that are sized at one unit of length, regardless of the size of the increment.

Each block contains information about the item; this information may include the item's subject, the case the item is associated with (in the Office calendar), the comments on the item, the contact whose address provides the location of the item, and the judge overseeing the item (if appropriate). For items where the upper and lower borders of the block do not exactly match the start and end times of the item, the exact times of the item are also included. Each block's background is colored according to the [Color-Coding](#) for the item's status.

Each block also has a narrow stripe running down its left side. This stripe is used to depict the length of an appointment more exactly than the half-hour rounding of the blocks; there are thin horizontal lines within this stripe that reflect the start and end time, and the span between the two stripes is usually highlighted in a color different from that of the main block. (Items that are Confirmed, Pending, or overdue do not have any coloring in the left stripe.)

The blocks' width depends on how many other items are listed in the calendar at the same time. If multiple items are being displayed for the same half-hour period, SmartAdvocate will automatically divide the available horizontal space among the items that are displayed. Note that the days displayed in the calendar, and the date range used to filter the items, are not connected to one another. Any item outside the filtering date range will not be displayed, even if it is during one of the displayed days, and vice versa. For this reason, it is recommended that you make sure you set your filtering date range to cover the displayed days.

Any item that spans multiple days will be displayed at the very top of the calendar, above the hour-by-hour division of the day. Such an item will have an arrow indicating the dates the item begins and ends, or, if the item starts or ends during the displayed days, it will have [Clock Icons](#) to indicate its start and end times. If the days displayed include the current day, there will also be a horizontal line across the entire display representing the current time of day; this is helpful for knowing at a glance how soon an appointment will be happening.

Day-by-Day Calendar Results

To display the calendar in a day-by-day form, where items are grouped by the day they occur and listed in order of their start times, click the Week or Month button in the calendar display buttons. The Week display is a day-by-day listing of the items in a seven-day period from Monday to Sunday of any week. The Month display is a day-by-day listing of the items in a five-week stretch starting on any Sunday and ending on the Saturday of the fifth week. Other than the number of days displayed and the arrangement of the days, there is no significant difference between the two settings.

Items in these calendars are displayed as blocks. The blocks' sizes are unimportant; they are simply large enough to contain the text within them. They are ordered by start time. Each block contains the information about the item, including the start and end times. Each block's background is colored according to the [Color-Coding](#) for the item's status. The start and end times are listed as text, except for multiple-day items.

Note that the days displayed in the calendar, and the date range used to filter the items, are not connected to one another; any item outside the filtering date range will not be displayed even if it is during one of the displayed days, and vice versa. For this reason, it is recommended that you make sure you set your filtering date range to cover the displayed days. Any item that spans multiple days will be displayed at the top of each day it spans, regardless of its start or end time. Such an item will have an arrow indicating the dates the item begins and ends, or, if the item starts or ends during the displayed days, it will have [Clock Icons](#) to indicate its start and end times as in the Timeline display setting (see below).

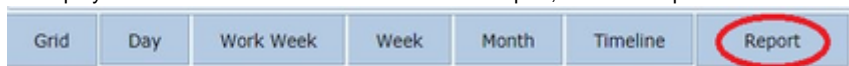
The Timeline

Clicking the Timeline button in the calendar display buttons will display the calendar in timeline form. In this form, the calendar displays ten consecutive units of time. There are several options for the length of a single unit of time: a year, a quarter, a month, a week, a day, an hour, or fifteen minutes. To change the length of a unit, right-click on empty space in the timeline, hover the mouse over Time Scales, then change the selections in the sub menu. The smallest selected time period is the one used for the length of one unit. By default, a unit is one day long; in this setting, the Timeline functions similarly to the Week or Month setting. You can also select how extensively the units are captioned: you can include a caption for every possible unit length, if you wish. The captions appear above the timeline, ordered from the largest unit's caption on top to the smallest on the bottom. However, there is little or no advantage to using labels other than the one for the length of one unit, since larger units' captions will generally contain redundant information.

The timeline is in some sense a combination of the hour-by-hour and day-by-day display styles. Items are displayed as blocks, and their vertical size is determined only by the amount of text in them, as with the day-by-day styles; however, they extend horizontally to depict their length and their start and end times, similar to the way that the hour-by-hour displays extend blocks vertically. For items whose start or end time do not exactly align with the time units in the timeline, [Clock Icons](#) are used to indicate the exact time. Each block's background is colored according to the [Color-Coding](#) for the item's status. Note that the time units displayed in the calendar, and the date range used to filter the items, are not connected to one another; any item outside the filtering date range will not be displayed even if it is during the displayed time, and vice versa. For this reason, it is recommended that you make sure you set your filtering date range to cover the displayed time.

Results Report

To display the items in the calendar in the form of a report, click the Report button in the calendar display buttons.



The report lists each item in order of the start date of the item (within a single date, the order of items varies). The information displayed in the report is essentially the same as in the [Table Results](#), but with no links, only text.

Clock Icons

Clock icons appear in the Day, Work Week, Week, and Month displays for items spanning multiple days, and in the Timeline display for any item where the start or end time of the item does not align with the time unit borders. A clock icon is a simple depiction of the face of a clock, with hour and minute hands positioned to represent the specified time. To distinguish between AM and PM times, the color of the clock's face is different: for times between 12:01 AM and 12:00 PM, the face is yellow, and for times between 12:01 PM and 12:00 AM, it is black.

The Date-Widget Tool

The display options that present items in some calendar form (specifically, Day, Work Week, Week, Month, and Timeline) include a tool for selecting the time period being displayed. This tool has four components: a page-back button, a button labeled Today, a date-widget drop down, and a page-forward button.

The page-back button shifts the displayed period back to the one ending immediately prior to the start of the current one, while the page-forward button advances the calendar to the period beginning immediately after the end of the current one. (For example, in the Work Week and Week views, each button shifts the displayed period by one week; in the Timeline view, each button shifts the displayed period by ten time units.)

The Today button shifts the period to the one beginning with, or nearest to beginning with, the current date. (For example, in the Day view, the button would switch to displaying the current date; in the Month view, the current date would simply be in the first week of the period displayed, since the period always begins with a Sunday.) Similarly, the date-widget dropdown shifts the period to the one beginning with, or nearest to beginning with, the date selected.

Right-Clicking

Except for the report, each display setting provides context-sensitive menus when you right-click on individual items or on empty space in the calendar. Right-clicking on a task brings up the options for that task; see [Tasks](#) in the [Case Summary](#) page for a description of these options. Right-clicking on an appointment brings up the options for that appointment; see [Pending Appointments](#) in the Case Summary page for a description of these options. Right-clicking on a critical deadline only offers one option, View Critical Deadlines; selecting this opens the [Critical Deadlines](#) page for the case to which that deadline applies.

Right-clicking on empty space brings up options mainly for the calendar display itself. Some of the options only appear in certain display views. The available options are:

New Appointment. This option serves the same purpose as the Add Appointment button; see [Adding an Appointment](#).

- Go to This Day: Only available in the Week and Month views. Opens the selected day in the Day view.
- Go to Today: Opens the current day in the Day view.
- Go to Date: Opens a panel allowing you to select a date and a display setting. Opens the selected day in the selected setting, functioning the same way as selecting a date in [The Date-Widget Tool](#) for that display setting.
- Change View To. Expands to a sub menu containing the five display settings. Changes the view to the selected setting, functioning the same way as clicking the button for that setting.
- 60 Minutes, 30 Minutes, 15 Minutes, 10 Minutes, 6 Minutes, and 5 Minutes. Only available in the Day and Work Week views. Changes the increment for that view to the selected time span.
- Time Scales. Only available in the Timeline view. Expands to a sub menu containing Year, Quarter, Month, Week, Day, Hour, and 15 Minutes. Allows you to select the increments for the Timeline.
- Time Scale Captions. Only available in the Timeline view. Expands to a sub menu containing Year, Quarter, Month, Week, Day, Hour, and 15 Minutes. Allows you to select which time-period labels appear at the top of the Timeline.

Add/Edit Panels

Panels are used nearly every time that any record, task, document, or other item is added into SmartAdvocate, or when editing existing records and items. A panel is a rectangular structure, generally much smaller than the browser window, that when opened appears over the SmartAdvocate page you are on. Some panels prevent you from performing any action elsewhere on the page while they are open; others do not. Most panels consist of a set of fields, which are individual places where information can be entered or choices made within the panel. There are panels for actions other than adding or editing items, but the vast majority of panels are used for adding and editing. This manual refers to such panels as Add/Edit Panels. In general, if there is a panel for adding some item to SmartAdvocate and a panel for editing that same type of item, the panels appear identical or nearly so, and their fields function the same way. For that reason, this manual will generally describe the adding panel for an item and the editing panel for that item as if they were the same panel (i.e. as the Add/Edit Panel for that type of item). If there are differences in the content of the two panels, they will be noted within the panel description.

Field Description Format

Individual fields in panels will be described with some or all of the following information:

Field Type: How the field accepts input. See Field Types, below, for a description of each of the types used in SmartAdvocate.

Meaning: The information the field is intended to contain.

Required?: Whether it is necessary to enter something into the field. If a field that is required is left blank, SmartAdvocate will not allow the item to be saved; it will either flag the field with a warning icon, declare an error, or both. Most required fields are distinguished in the panel by an asterisk next to the name of the field. However, this is not true in all cases; some required fields do not have asterisks, and some fields with asterisks are not actually required.

Related Links: Links to other pages in the manual where an aspect of the field is described. This descriptor is often used for drop downs where the set of options is drawn from a pick list in the Pick list Maintenance administrative page.

Options: A list of the possible selections in the field. This descriptor is used for drop downs and radio buttons where the set of options can be efficiently listed or described and is not directly modifiable by the user.

Other Notes: Any notes or warnings that help describe the field.

Field Types

The following is a list of the most common field types in SmartAdvocate.

Text input

Text input fields are simply blank areas into which you can type any text. They can be any size. They do not limit input or provide guidance as you type. Note, however, that though you can technically type anything into a text input field, some panels will declare an error if you enter the wrong type of input. This is most often true when the expected input is a number or dollar amount. If a text input field declares an error for certain inputs, this manual will usually mention that in the description of the field.

Numeric input

Numeric input fields are similar to text input fields, but only accept numbers. They also have two arrow buttons at the right side of the field, which can be used to increment or decrement the number in the field. You can either type input into the field directly or use the buttons to produce your desired input.

Checkbox

Check boxes are used when the field only requires a yes-or-no response. In general, check boxes are either selected (i.e., they contain a check mark), meaning yes, or deselected (i.e., they contain no mark), meaning no. Click the checkbox to switch between selected and deselected. A few check boxes have a third option: a blue square filling the box, meaning "undetermined." When this option is available, this manual will make special note of that fact. Otherwise, the manual will never mention whether an entry in a checkbox is "required," because a checkbox always contains information (either a yes or a no).

Drop down

Drop down fields look like text input fields but have a button with a downward-pointing triangle at the right side of the field. Clicking this button causes a menu to appear from which you can choose the entry for the field. There are various types of drop downs, some of which are separately listed below; which is which depends on the type of menu that appears upon clicking the button. When the manual describes a field as simply a "drop down," with no other modifier, the menu is simply a listing of various options. Clicking the desired option will fill the field with that option. It is also usually possible to type directly into the text input fields. Doing so will usually cause the menu to be limited to the options containing the text in the field; this can help you search for the option you want. For some drop downs, if none of the options contain the text you type, the field will automatically undo your typing; others will allow you to keep typing even if there are no remaining options (though trying to save an entry that matches none of the options will almost always cause an error).

Date widget drop down

Date-widget drop downs are used when the field requires a date. Clicking the drop down button brings up a small calendar showing a single month (either the month of the date already in the field, or the current month). There are two buttons each at the top left and top right corners of the calendar: << moves the calendar back one year, < moves the calendar back one month, > moves the calendar forward one month, and >> moves the calendar forward one year. Click any day in the calendar to fill the field in with that date. You can also click the Today button at the bottom of the calendar to fill the field in with the current date, or the Clear button to empty the field (this will technically fill the field with a placeholder date that SmartAdvocate translates to an empty field).

Date-time widget drop down

Date-time widget drop downs are extensions of date widget drop downs. In addition to the calendar for selecting a date, they contain a clock for selecting a time.

Contact-list drop down

Contact-list drop downs are used when the field requires an existing SmartAdvocate contact. Clicking the drop down button brings up a table containing contacts. The table may contain all the contacts in SmartAdvocate, or may only contain a subset of all contacts (e.g., only those of a certain Contact Type, or employees of an organization previously selected elsewhere in the panel, or contacts that have already been attached to the case you are in). Clicking on any row of the table will fill in the field with the contact in that row. The table will commonly contain columns for the contact's name, address, city, state, ZIP code, and phone number, but there may be more or fewer in different fields. The table will also often include a button or hypertext allowing you to create a new contact, if the desired contact has not already been entered into SmartAdvocate. Clicking the button or text will bring up the [Add New Contact](#) panel.

Checkbox-select drop down

Checkbox-select drop downs are used when the field requires a selection from a limited set of options, but allows more than one option to be selected. The precise appearance of a checkbox-select drop down varies among fields, but the consistent aspects are a list of options and a checkbox for each option. Clicking on any checkbox includes the associated option in the selection. Most checkbox-select drop down fields automatically separate the selected options with semicolons.

Radio button

Radio buttons are sometimes used when the field requires a selection from a limited set of options. The options are all simultaneously visible on the panel, each of which is associated with a round button that is either selected (i.e., it contains a blue dot) or deselected (i.e., it is empty). Only one of the buttons can be selected at a time; selecting one deselects whichever was previously selected. The option associated with the selected button is considered by the panel to be the chosen option. Radio buttons serve a similar purpose to drop downs. While they are less common, they are most often used when the selected option itself influences another part of the panel; for example, when another field may or may not be editable, depending on which radio button was selected.

Tables

Much of the information you can access and manage in SmartAdvocate is presented in the form of a table. There are slight differences among the various tables in SmartAdvocate, but most share the same fundamental interface. This section describes the general structure of SmartAdvocate tables and lists the most common features.

General Structure

In most cases, SmartAdvocate uses rows to represent the individual objects whose information is being stored (e.g. plaintiffs, deadlines, etc.), and columns to represent the various pieces of information about those objects (e.g. the name of the plaintiff, the date of the deadline, etc.). Tables are divided into pages, each of which includes up to a certain number of rows (this number varies depending on the table). Only one page of a table is visible at a time. (See the pagination tool below for navigating between pages of a table.) Even a single page of a table may be larger than what can fit on a screen. If so, the vertical scroll bar at the right side of the table will be active, for use in scrolling through the results on a given page. This scroll bar only affects the table, not the entire screen or panel; a few screens and panels have both a scroll bar and a table with its own scroll bar. A few tables also have horizontal scroll bars because they have too many columns to all appear on the screen at one time.




Many tables have one or more non-data columns. There are two main types of non-data columns: actions and check boxes. Action columns consist of an icon or set of icons, usually the same in every row, that can be clicked to perform some action on that row. The name of an action column is usually "Action" or "Actions," but can vary. Common icons in action columns include the [Edit icon](#), which brings up the edit panel; the [Right-click icon](#), which brings up a menu of options that can also be accessed by right-clicking anywhere on the row; and the [Delete icon](#), which deletes the row (there is a confirmation message first to avoid accidental deletion). Many of the other icons that may appear in certain tables in SmartAdvocate are described in the [Icons](#) chapter of this manual. Checkbox columns consist of a checkbox in every row, and the column heading may also be a checkbox. These columns are used to select multiple rows in tables that allow various types of mass actions.

Adding Rows

Some tables have a button for new record creation. This button will be to the upper left of the table and is labeled "Add [the type of item in the table]" or "New [the type of item in the table]". Clicking this button will bring up the same panel as the pencil icon, but with all of the fields blank or set to their defaults. Saving changes made in this panel will create a new row in the table (whereas saving changes made in the panel brought up by the pencil icon will only change an existing row of the table).



Export Icons

Some tables have icons at the upper right of the table, next to the word Export. These icons allow you to export the table to various file formats. The [Adobe icon](#)

[icon](#)  exports to a PDF file, the [Excel icon](#)  exports to an XLS file, and the [Word icon](#)  exports to an RTF file (usable in Word and other popular Word processors). Since it is not possible to change the page layout in the PDF once it has been created, and the standard page layout is not well suited to displaying large data tables, it is not recommended to export to that format unless you are only displaying relatively few results and relatively few columns.

Sub Tables and the Open/Closed Column

Some tables have an open/closed column as their leftmost column. The open/closed column has no heading, cannot be resized, moved, or hidden, and

the only thing in the column is an open/close icon (generally a plus sign  if the column is closed, or a negative sign  if the table is open) in each row. The plus sign indicates that each row of the table contains one or more sub tables. A sub table is a table that is specifically related to the row containing it. For instance, each row in a table of medical providers will have sub tables listing Medical Visits, Medical Bills, and Amount Paid for that particular medical provider. The sub tables appear immediately below the row containing them (i.e. between the row containing it and the next row of that table), indented slightly to the right. To view the sub tables belonging to a particular row in the table that contains them, click the open/close icon (the

plus sign) in that row, which will cause it to change to a negative sign (indicating that the sub table is open) instead of the plus sign (indicating that it is closed). If a different row in the same table was previously open and displaying sub tables, it will automatically close; at most one sub table in a given table is ever open at a time.

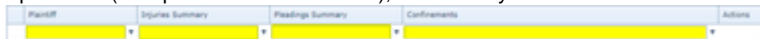
Pagination

Some tables, if there are sufficient rows, divide the results into pages. These tables will have a pagination tool to the lower left of the table. It will tell you what page of the results you are on, how many pages of results there are in total, and how many individual results there are in total. It also allows navigation between pages. You can either click the Page Left (" $<$ ") or Page Right (" $>$ ") buttons, which will respectively move back or forward one page of results, or click one of the numbers between those two buttons to move directly to that page. (If there are many pages of results, only a few page numbers will be visible to click on, so this shortcut will only be useful for skipping to the end or beginning of the results.)

Filtering Tools

Some tables have the Create Filter link, which is at the very bottom of the screen, below the pagination tool (if the pagination tool is present). Clicking either the Create Filter text or the pin icon immediately to its left will bring up the Filter Builder panel. If there is already an active filter, the Create Filter text will be replaced by the text of the filtering condition (you can click to edit that condition in the Filter Builder panel). Additionally, there will be a checkbox to the left of that text that can be used to temporarily deactivate the filter, and all the way on the right will be the Clear button, which will eliminate the filter entirely. In some cases, if there is no active filter, the Create Filter tool will not appear in the table, but if there is an active filter, the text of the filtering condition will appear.

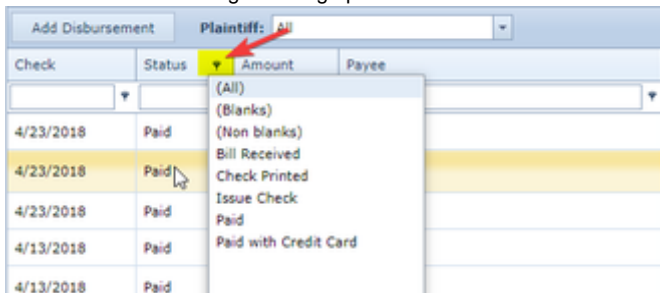
There are usually simpler ways of filtering the results than using the Filter Builder. Immediately below the column headings in the table is a row of empty input fields (except in non-data columns), into which you can enter text to filter the table on that column.



| Plaintiff | Plaintiff Summary | Findings Summary | Conflicts | Actions |
|-----------|-------------------|------------------|-----------|---------|
| | | | | |

Each empty input field also has a pin icon next to it. Clicking this pin icon after you have entered text into the associated field allows you to change the way that text is used to match the data in the table. For textual columns, you can choose to find data that "Begins with" the text, "Contains" the text (which is the default), "Doesn't contain" the text, "Ends with" the text, "Equals" the text, or "Doesn't equal" the text. For numeric columns, you can choose to find data that "Equals" the number, "Doesn't equal" the number, "Is less than" the number, "Is less than or equal to" the number, "Is greater than" the number, or "Is greater than or equal to" the number. For date columns, you must enter a date (using a [Date-widget dropdown](#)), and its pin icon presents the same options as numeric columns, except that "less than" and "greater than" mean "before" and "after," respectively. You may enter text into multiple columns, which will only retrieve data that matches every column with text in it (i.e. it will create an AND filter). Filtering the table using the input fields may automatically create a filter in the Filter Builder and apply it to the table. The created filter will replace the Create Filter tool (just as a filter created in the Filter Builder does) and will be accessible (and editable) in the Filter Builder panel by clicking it.

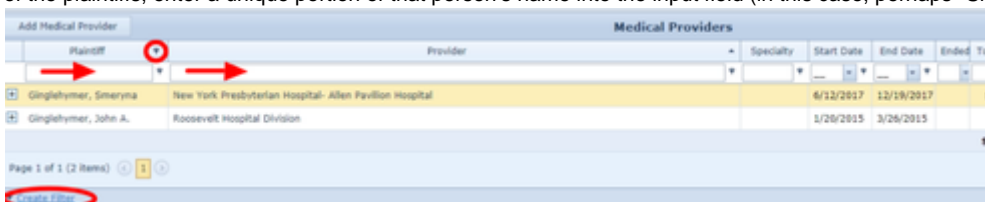
There is one even simpler way of filtering the results. Some column headings themselves have pin icons next to the name of the column. Clicking the pin icon in a column heading will bring up a list of all the distinct contents of the cells in that column.



| Check | Status | Amount | Payee |
|-----------|--------|--------|-------|
| | | | |
| 4/23/2018 | Paid | | |
| 4/23/2018 | Paid | | |
| 4/23/2018 | Paid | | |
| 4/13/2018 | Paid | | |
| 4/13/2018 | Paid | | |

In some cases, there will be a checkbox next to each item in the list. If there is no checkbox, you may simply select one of the options in the list, and the table will only show results matching the option you selected. If there are check boxes, you may select any number of the check boxes to only show results matching one of the items you selected. After selecting whichever check boxes you wish, press the OK button below the list to save your selections and create the filter. You can press the Cancel button instead to undo your selections and close the list. If none of the check boxes are selected (which is the default), or if the "(Select All)" box is selected, none of the results will be excluded based on that column. (Technically, if the Select All box is selected, it will create a filter, but that filter will have no effect on which results appear.) Selecting every box except the "(Select All)" box will automatically also select the "(Select All)" box. You may use this list filter on multiple columns, much like using the text-entry filter on multiple columns. Indeed, you may also use the list filter on some columns and the text-entry filter on others. (You may not, however, use the list filter and the text-entry filter on the same column. Using either will override the other.)

As an example, in the screen shot below, you can enter filter terms in the input fields (red arrows). If you only want to see the medical providers for one of the plaintiffs, enter a unique portion of that person's name into the input field (in this case, perhaps "Smeryna") to limit the results to only that person.



| Plaintiff | Provider | Specialty | Start Date | End Date | Ended | Total |
|----------------------|---|-----------|------------|------------|-------|-------|
| Gingelhymer, Smeryna | New York Presbyterian Hospital- Allen Pavilion Hospital | | 6/12/2017 | 12/19/2017 | | \$8 |
| Gingelhymer, John A. | Roosevelt Hospital Division | | 1/20/2015 | 3/26/2015 | | \$8 |

Column Display Configuration

Some tables have a Show/Hide Columns button to the lower right of the table. Clicking this button brings up the Column Chooser panel (which in many, but not all, tables is empty by default, meaning that all columns are currently visible). You can drag any of the column headings into the Column Chooser panel, which will hide that column from appearing in the table of results. You can also drag any column heading out of the Column Chooser panel to a spot among the headings in the table of results, which will make that column visible again in the spot to which you dragged it. Even if a column is hidden,

you can still sort the table based on that column by clicking its heading in the Column Chooser panel. To hide the Column Chooser panel itself, click the white X in the upper right corner of the panel. You can also move the Column Chooser panel by dragging its top bar (containing the text "Column Chooser") wherever you choose. This can be particularly helpful if the Column Chooser panel is hiding a portion of the table you want to view.

In many tables, you may rearrange the columns in any order you choose by dragging their headings to the positions you prefer. You can only drag the headings to other parts of the heading area; if a heading is dragged anywhere else, it will have no effect. (The exception is if a heading is dragged into the Column Chooser panel; see above.) In some tables, you may also change the width of columns by clicking the line separating the column whose width you want to change from the column to its right, then dragging it as desired.

Sorting

You can sort most tables based on any data column by clicking the heading of that column; a small triangular icon will appear on the right side of the column heading. Clicking the same heading again will reverse the order of the sort. You can only sort by one column at a time. Note: columns that appear to be numeric may in fact be considered generic text by the SmartAdvocate system, in which case it will be sorted alphabetically. This would mean, for example, that "7" would be treated as later than "605."

How to sort using multiple columns on a grid

Accessing SmartAdvocate®

Logging In to SmartAdvocate®

Once SmartAdvocate® has been installed, you will be provided login information (typically an Icon on your desktop or Favorite in your browser) that will take you to the following login screen:



Enter the User Name and Password that were provided to you by your system administrator. If you are the only person who has access to your computer, you may also check the "Remember me" box. Click on the "Login" button to enter the SmartAdvocate system. SmartAdvocate SaaS or Cloud customers are required to enter their firm's tenant name (the name of their tenant database on the SmartAdvocate server) along with their user name in the User Name field on the login page. For example, if their user name is "Harry" and the firm's tenant name is coollawfirm, the following is entered into the User Name field: harry@coollawfirm.

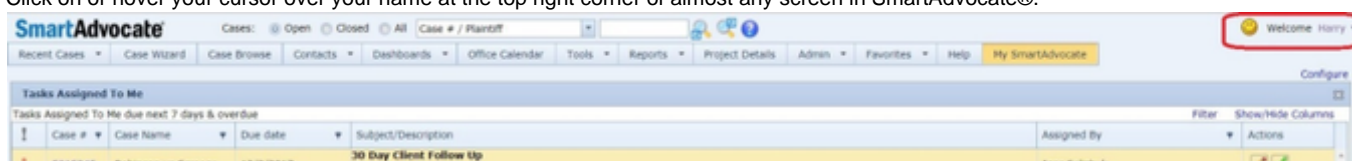
You can avoid the need to enter the "@coollawfirm" portion in the User Name area by adding certain information to the URL used in your browser. If you log in to SmartAdvocate using <https://app.smartadvocate.com/SA/login.aspx?>, then simply change the URL to <https://app.smartadvocate.com/SA/login.aspx?tenantname=coollawfirm>. You will then only be required to enter your user name into the login screen. The name of the tenant system can be

found in the System Parameters section of the Admin area of SmartAdvocate.
+<https://app.smartadvocate.com/SA/login.aspx?tenantname=CoolLawFirm+>

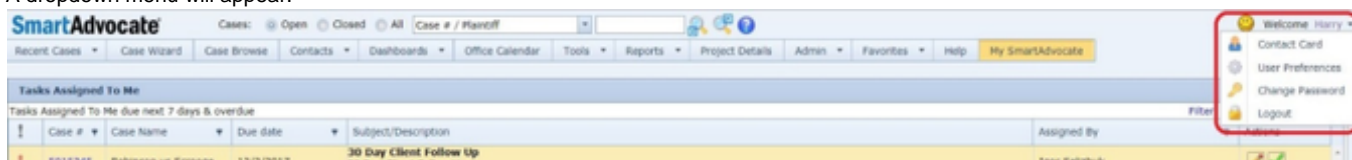


Logging out of SmartAdvocate®

Click on or hover your cursor over your name at the top right corner of almost any screen in SmartAdvocate®.



A dropdown menu will appear.



Click "Logout." You will be brought back to the Login screen, even if you had previously checked the "Remember me" box.

Quick Case Search

The Quick Case Search is the simplest way to search for a matter in SmartAdvocate. It can be found at the top center of nearly every screen in SmartAdvocate (the [Case Wizard](#) and [Contact Card](#) screens being exceptions) and consists of the following, from left to right:



- There is a selector, which allows you to choose whether the results contain only open cases, only closed cases, or both. (Note: for most parameters, selecting "open" will return everything not formally closed, including cases without a status, and for some parameters it will also return non-case contacts.)
- The drop down list allows you to choose your *search parameter*, the data column by which to search. The default is to search by Case # / Plaintiff, although you can change this default to any of the other search parameters under User Preferences.
- An input field (or two, in the case of date ranges) allows for you to enter your *search string*, which is the series of characters that will be fed into the search system.
- There are two magnifying-glass icons, the first with an arrow pointing down and to the left, the second with an arrow pointing up and to the right. Clicking the first will present the search results to you in the same tab in which you are currently working. Clicking the second will present them to you in a new tab. You can also press Enter instead of clicking either of these buttons to get the search results; by initial default, doing so will present them to you in a new tab. You can change that behavior in User Preferences. (See [User Preferences](#) for details.)
- Lastly, there is a question mark icon. Clicking this will present you with a very basic overview of search string behavior (Boolean searching) for the "Case # / Plaintiff" parameter.

By Case # / Plaintiff

This search parameter is the initial default for Quick Case Search, although you can change the default parameter in User Preferences. (See [User Preferences](#) for details.) Using this parameter will search for cases where at least one plaintiff OR the case number in SmartAdvocate matches the provided search string.

What qualifies as a match?

The search is not case-sensitive. For basic text or numeric searches (i.e. those without wildcards or commas), the search will return all cases where either a plaintiff organization's name, a plaintiff individual's *last name*, or the case number *begins with* the provided search string. To search both the last and first name of a plaintiff, use a comma to separate the two, putting the last name first. Spaces immediately before or after the comma do not matter. Both the last and first name can be partial (however, it will need to be the *beginning* of the respective names). You can search by first name only by starting the search string with just a comma.

For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters. The underscore character ("_") can be used in place of a single unknown character, and the asterisk character

("**") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards are especially helpful if you aren't sure of the spelling of a name or want to search by a part of the name that is not at the beginning.

Case # Exact Search

If your search string exactly matches an existing case number, you will be redirected to the [Case Summary](#) page for that case instead of the search results. Note that this only occurs under this specific circumstance; it will not happen if wildcards are used or if the string exactly matches a plaintiff name, even if there is only one result from the search.

By Claim

Using this parameter will search for cases where an associated claim number matches the provided search string.

What qualifies as a match?

The search is not case-sensitive. For basic searches (i.e. those without wildcards), the search will return all cases where a claim number associated with the case *contains* the provided search string. For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters. The underscore character ("_") can be used in place of a single unknown character, and the percent character ("%") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards can be helpful if you aren't sure of individual digits in the number.

By Date of Birth

Using this parameter will search for cases where at least one plaintiff's date of birth is between the dates selected, and furthermore will search for all other contacts whose date of birth is between the dates selected.

Selecting Dates

When you select "Date of Birth" in the Quick Case Search, the input field will become two [Date-widget drop down](#) fields.

Note: Do not leave either field blank, and do not choose a year earlier than 1800 (which may cause an error). If you want to search all D.O.B.s before a certain date, using the year 1800 in the first field should be more than sufficient to cover all relevant contacts.

Handling the Results

The search results will include all instances where a plaintiff's date of birth falls in the selected range. If you chose to search in All cases, however, rather than just Open or Closed ones, the results will also include any other contacts whose date of birth fall in that range. The results for plaintiffs will include all relevant case information, in particular a case number if there is one. The results for other contacts will only include the date of birth and the name of the contact.

By Date of Incident

Using this parameter will search for cases where the date of incident is between the dates selected.

Selecting Dates

When you select "Date of Incident" in the Quick Case Search, the input field will become two [Date-widget drop down](#) fields.

Note: Do not leave either field blank, and do not choose a year earlier than 1800 (which may cause an error). If you want to search all D.O.I.s before a certain date, using the year 1800 in the first field should be more than sufficient to cover all relevant incidents. If you want to search for a specific date, rather than a range, enter that date into both dropdown fields.

By Defendant

Using this parameter will search for cases where at least one defendant matches the provided search string.

What qualifies as a match?

The search is not case-sensitive. For basic text or numeric searches (i.e. those without wildcards or commas), the search will return all cases where either a defendant organization's name or a defendant individual's last name *begins with* the provided search string.

To search both the last and first name of a plaintiff, use a comma and a space to separate the two, putting the last name first. You must put exactly one space after the comma. If you are not using wildcards, you will need to write the entire last name before the comma, but the first name can be partial (however, it must be the *beginning* of the defendant's first name).

For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters. The underscore character ("_") can be used in place of a single unknown character and the asterisk character ("**") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards are especially helpful if you aren't sure of the spelling of a name, want to search only by first name, or want to search by a part of the name that is not at the beginning.

By E-mail Address

Using this parameter will search for cases where at least one plaintiff's email address matches the provided search string, and furthermore will search for all other contacts whose email address matches the provided search string.

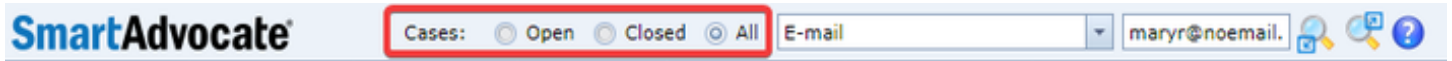
What qualifies as a match?

The search is not case-sensitive. For basic searches (i.e. those without wildcards), the search will return all plaintiffs and other contacts whose email address *contain* the provided search string. For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters.

The underscore character ("_") can be used in place of a single unknown character, and the percent character ("%") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards can be helpful if you aren't sure of the top-level domain (e.g. .com or .net) or want to find all addresses belonging to the same domain name (i.e.: "%@gmail.com" will find any email addresses using the gmail domain).

Handling the Results

If the search is set to search in either Open or Closed cases, the search results will only include instances where a plaintiff's email address matches the provided search string. In order to include search results that include both plaintiffs and all other contacts whose email matches the string, it is necessary to search in All cases.



The results for plaintiffs will include all relevant case information, particularly a case number if there is one. The results for other contacts will only include the email address and the name of the contact. The contact will always be listed under the Plaintiff/Contact column, regardless of the role or roles the contact may have within the SmartAdvocate system.

By Phone

Using this parameter will search for cases where at least one plaintiff's phone number matches the provided search string, and furthermore will search for all other contacts whose phone number matches the provided search string.

What qualifies as a match?

For basic searches (i.e. complete phone numbers), the search will return all plaintiffs and other contacts whose phone number *exactly matches* the provided search string. The field for entering phone numbers provides you with the structure of a phone number, i.e. () - . If any of these ten digits is left blank, it is automatically treated as an underscore wildcard character, which means it will match any digit. It is not possible to use the percent wildcard character when searching phone numbers. You may leave as many digits blank as you wish, in any positions, but cannot leave the entire phone number blank. This can be helpful if you aren't sure of an individual digit, or of the area code. You could also use blank digits to retrieve all contacts within a given area code.

Handling the Results

The search results will include all instances where a plaintiff's phone number matches the provided search string, but also all other contacts whose phone number matches the string. The results for plaintiffs will include all relevant case information, particularly a case number if there is one. The results for other contacts will only include the phone number and the name of the contact. The contact will always be listed under the Plaintiff/Contact column, regardless of the role or roles the contact may have within the SmartAdvocate system.

Employing Organizations

If a contact is employed by an organization, that organization's phone number will automatically be listed in the contact's contact card as an Organization type phone number (if it is not already separately listed among the contact's phone numbers, i.e. under Work Phone). However, the contact will not be in the search results if the organization's phone number matches the search string. (The organization itself will be in the results.)

By License Plate

Using this parameter will search for cases where an associated automobile license plate number matches the provided search string.

What qualifies as a match?

The search is not case-sensitive. For basic searches (i.e. those without wildcards), the search will return all cases where a license plate number associated with the case *contains* the provided search string.

For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters. The underscore character ("_") can be used in place of a single unknown character, and the percent character ("%") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards can be helpful if you only have a partial plate number.

By Driver's License

Using this parameter will search for cases where an associated driver's license number matches the provided search string.

What qualifies as a match?

The search is not case-sensitive. For basic searches (i.e. those without wildcards), the search will return all cases where a driver's license number associated with the case *contains* the provided search string.

For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters. The underscore character ("_") can be used in place of a single unknown character, and the percent character

("%") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards can be helpful if you aren't sure of the exact license number.

By Policy

Using this parameter will search for cases where an associated insurance policy number matches the provided search string.

What qualifies as a match?

The search is not case-sensitive. For basic searches (i.e. those without wildcards), the search will return all cases where an insurance policy number associated with the case *contains* the provided search string.

For more flexibility in searching, you may use wildcards. These are symbols that represent either a single unknown character, or an unknown number (possibly zero) of unknown characters. The underscore character ("_") can be used in place of a single unknown character, and the percent character ("%") can be used in place of an unknown number of unknown characters. You may freely combine wildcards as needed. These wildcards can be helpful if you aren't sure of the exact policy number.

By Social Security

Using this parameter will search for cases where at least one plaintiff's social security number matches the provided search string, and furthermore will search for all other contacts whose social security number matches the provided search string.

What qualifies as a match?

For basic searches (i.e. complete social security numbers), the search will return all plaintiffs and other contacts whose social security number *exactly matches* the provided search string. The field for entering social security numbers provides you with the structure of a social security number. If any of these nine digits is left blank, it is automatically treated as an underscore wildcard character, which means it will match any digit. It is not possible to use the percent wildcard character when searching social security numbers. You may leave as many digits blank as you wish, in any positions, except that you may not leave the entire social security number blank. This can be helpful if you aren't sure of an individual digit, or only know the last four digits.

Handling the Results

The search results will include all instances where a plaintiff's social security number matches the provided search string, but also all other contacts whose social security number matches the string. The results for plaintiffs will include all relevant case information, particularly a case number if there is one. The results for other contacts will only include the social security number and the name of the contact.

Search Results

When you search for a matter using the Quick Case Search, the search results will be provided to you in the form of a table where each row contains the information from an individual result. The information is separated into a series of columns, each of which relates to a particular category of information. The available columns vary slightly depending on which parameter you used for the search, but most of them will be available for any parameter. The columns that are available for all parameters are:

- **Case Number:** The number of the case in the SmartAdvocate system, sometimes followed by an icon of an arrow pointing down and to the left. Clicking the number itself will open the case summary for that case number in a new tab; clicking the icon instead, when it is available, will open the case summary in the tab in which you are currently working.
- **Incident Date:** The date of the incident.
- **Plaintiff/Contact:** The name of the plaintiff or contact returned by the search. This column's behavior varies a little depending on the search parameter. In some cases, it can return any contact at all; in others, it will return only the primary plaintiff in the case matching the search; in still others, there will be a separate row in the results for each plaintiff matching the search. Clicking the name will open the contact card for that contact in a new tab.
- **Defendant:** The name of the defendant. When searching using the "Defendant" parameter, this will return a separate row in the results for each defendant matching the search; otherwise, it will contain only the *primary* defendant in the case matching the search. Clicking the name will open the contact card for that defendant in a new tab.
- **Case Type:** The case type as recorded in the SmartAdvocate system upon case creation, or as edited thereafter. This column will not show the case sub type.
- **Action:** This column often contains three icons: Add Note, Add Telephone Message, and Generate Barcode. Clicking any of these icons will open a window (a pop-up for Add Note or Add Telephone Message, a new tab for Generate Barcode) where you can perform the respective action for the case associated with that search result row. Depending on the nature of the table you are in, additional actions may be available as well.
- **Case Status:** The current primary case status as recorded in the SmartAdvocate system.
- **Attorney:** The staff member(s) with an attorney-type role in the case. Attorney-type roles include Primary Attorney, Managing Attorney, Attorney, and sometimes Case Manager. This column's behavior varies a little depending on the search parameter. In some cases, it will contain all attorneys in the case matching the search; in others, it will return a separate row for each attorney in the case matching the search. Clicking the name has no effect.
- **Docket No:** The docket number(s) associated with the case. When searching using the "Docket #" parameter, this will return a separate row in the results for each docket number matching the search; otherwise, it will contain all docket numbers associated with the case matching the search. If more than one docket number matches the search, they will be separated by a semi-colon.
- **State:** The state in which the case is being litigated. This column is unrelated to the state in which the office handling the case is located.

For each parameter, there are one or two additional columns that will only be available when searching by that parameter. In most cases, the column will simply be the parameter itself (e.g. phone number). A few cases are less simple. The additional columns available for each parameter are as follows:

- **Plaintiff / Case #:** Additional Plaintiff, Paralegal. Additional Plaintiff contains all plaintiffs in the case other than the one in the Plaintiff/Contact column. Paralegal contains all staff members with a paralegal-type role in the case. Paralegal-type roles include Primary Paralegal, Paralegal, and Intake Paralegal. In neither of these columns does clicking the name have any effect.
- **Claim #:** Claim No. The claim number matching the search.
- **Date of Birth:** DOB. The date of birth matching the search.
- **Date of Incident:** No additional columns (Incident Date is already available for all parameters).
- **Defendant:** Paralegal. See Paralegal under Plaintiff, above.
- **Docket / Index #:** Court, Judge. Court contains the court at which the docket matching the search is located. Judge returns a separate row for each judge or clerk associated with the docket matching the search. Clicking the name has no effect.
- **E-mail:** Email. The email address matching the search.

- **Phone #:** Contact No. The phone number matching the search.
- **Plate #:** Plate No. The license plate number matching the search.
- **Drivers License #:** License No. The driver's license number matching the search.
- **Policy #:** Policy No. The insurance policy number matching the search.
- **SSN #:** SSN. The social security number matching the search.

The search results page includes a summary to the upper left of the table, which lists your search parameter, search string, and the total number of results returned.

SmartAdvocate Cases: Open Closed All Case # / Plaintiff

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools

Search results for E-mail "%@smartadvocate.com" returned 219 items

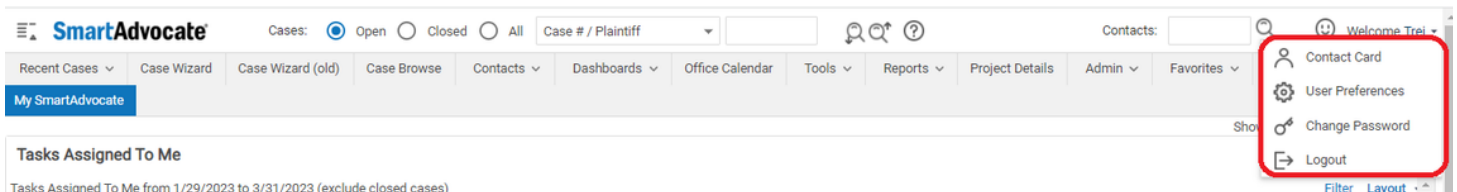
| Case Number | mail | Incident Date | Plaintiff/Contact | Defe |
|-------------|--------------------------|---------------|-----------------------|------|
| 6000018 | claude@smartadvocate.com | 1/13/2016 | Simpson, Claude, Esq. | Doe, |

User Drop-down Menu

The User Drop-down Menu allows you to edit your account information and preferences, or to log out of the system. It is accessible from nearly every screen in SmartAdvocate (the [Case Wizard](#) and [Contact Card](#) being exceptions) but is not visible until you hover the mouse pointer over either your own name in the far upper-right corner of the screen, or the triangular icon immediately next to your name. Once it is visible, the menu consists of the following four options, from top to bottom:

- **Contact Card:** Opens your own contact details in a new tab. See [Contact Card](#) for details about this screen.
- **User Preferences:** Opens a panel that allows you to edit various settings for your SmartAdvocate account. See [User Preferences](#) for details about this screen.
- **Change Password:** Opens a panel that allows you to change your password. This panel consists of three fields. You must input your current password into the first field (marked "Old Password:") and input your desired new password into both of the other two fields. Click "OK" to save the new password or "Cancel" to abandon the change.
- **Logout:** Logs you out of SmartAdvocate and redirects you to the Login screen, even if you previously checked the "Remember me" button when you logged in.

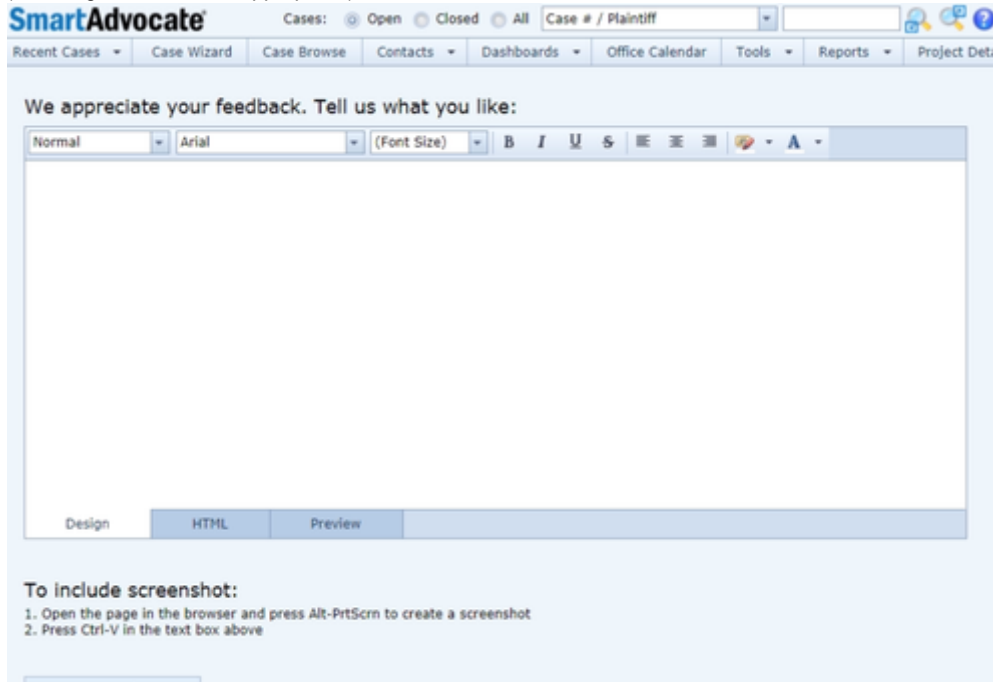
Next to the menu is a smiley-face icon (😊). Clicking on or hovering over this icon reveals a drop-down menu with two options: "Tell Us What You Like" and "Tell Us What Can Be Better." Both of these options open a screen in a new tab that allows you to submit feedback about the SmartAdvocate system. Clicking "Tell Us What You Like" will flag the feedback as positive, while clicking "Tell Us What Can Be Better" will flag it as critical. See [Suggesti ons](#) for details about this screen. (Though not technically part of the main user drop down, this feature is associated with your user experience of the site and so is documented here.)



Suggestions

This screen allows you to submit feedback and suggestions to the SmartAdvocate team. It is not suitable for support queries, bug reports, or other requests for immediate help; those should be submitted by the firm administrator to the Support Tracker. The suggestion screen includes a prompt (which will be slightly different depending on whether you reached this screen by clicking "Tell Us What You Like" or "Tell Us What Can Be Better"), a

rich text input tool, instructions for including a screenshot, and a button labeled "Send." To submit your feedback, simply write it out in the text tool (including screenshots if appropriate) then click "Send".



The image shows a screenshot of the SmartAdvocate web application's feedback form. At the top, the SmartAdvocate logo is on the left, and navigation links for 'Cases' (Open, Closed, All), 'Case # / Plaintiff', and other menu items like 'Recent Cases', 'Case Wizard', 'Case Browse', 'Contacts', 'Dashboards', 'Office Calendar', 'Tools', 'Reports', and 'Project Details' are on the right. The main heading reads 'We appreciate your feedback. Tell us what you like:'. Below this is a rich text editor with a toolbar containing options for font style (Normal), font face (Arial), font size, bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, link, unlink, and text color. A large text area is provided for input. At the bottom of the text area are three tabs: 'Design', 'HTML', and 'Preview'. Below the text area, a section titled 'To include screenshot:' provides instructions: '1. Open the page in the browser and press Alt-PrtScr to create a screenshot' and '2. Press Ctrl-V in the text box above'.

User Preferences

The User Preferences function allows users to set defaults for certain pages and to display specific items throughout the system. The preferences are set for a specific user individually and does not change the settings globally or system wide.

1. Access the User Preferences by clicking on your login name in the top right corner of almost any screen in SmartAdvocate.
2. Click "User Preferences" from the pulldown menu.

The following User Preference screen will be displayed:

User Preferences ✕

Top Search

Open Closed All

Open new tab for search result

Mode:

Default search area:

Documents and Emails

Download documents for editing

Show emails on Document screen

Show photos on Document screen

Show envelopes on Document screen

Use Outlook to send emails

Styles

Display theme:

Default font for new notes:
 points

Default paging size for large grids:

Preferred time zone:

Email Notifications

Notify me when:

Case is automatically assigned to me

Case is assigned to me by staff

One of my cases is closed or reassigned

Workflow is assigned to me

Task I created is completed

My Case Role:

Documents are attached to my cases

Attach the document to email

Select document categories/direction

Text messages are received for my cases

Text messages are sent from my cases

SOLs are added/modified in my cases

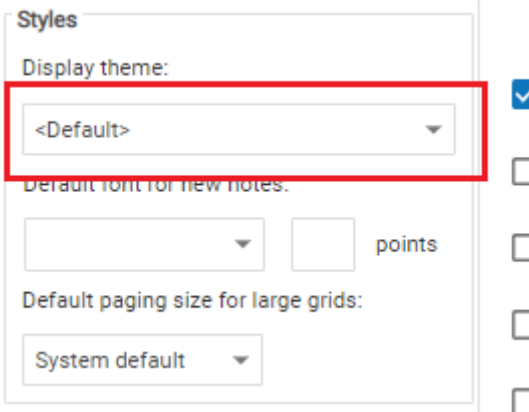
Notes are added to my cases

Appointments are added to my cases

SAVECANCEL

Make any appropriate changes for your account. When finished, click on "Save" and the changes will take effect. We generally recommend that you not initially make any changes in the Email Notifications settings. Receiving these notifications can be an extremely useful way to learn when someone else, or the system itself, has taken some action that may impact you or one of the cases to which you have been assigned. Once you have used SmartAdvocate for a period of time and are comfortable with its functionality and the notifications you have been receiving, you can return to this screen and make any changes regarding notifications you no longer wish to receive.

Under the Styles section, you can choose a theme for SmartAdvocate, altering the default colors, fonts, etc. to your preferences.

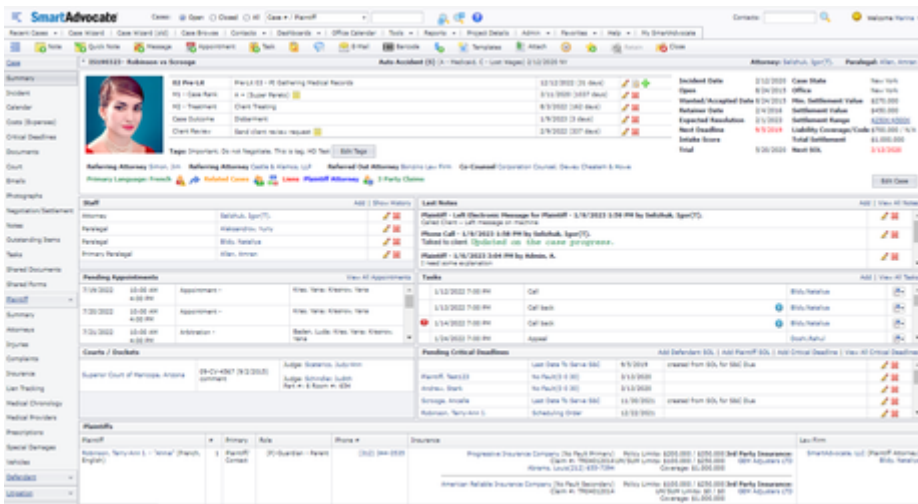


Access to User Preferences can be blocked in User Permission Groups.

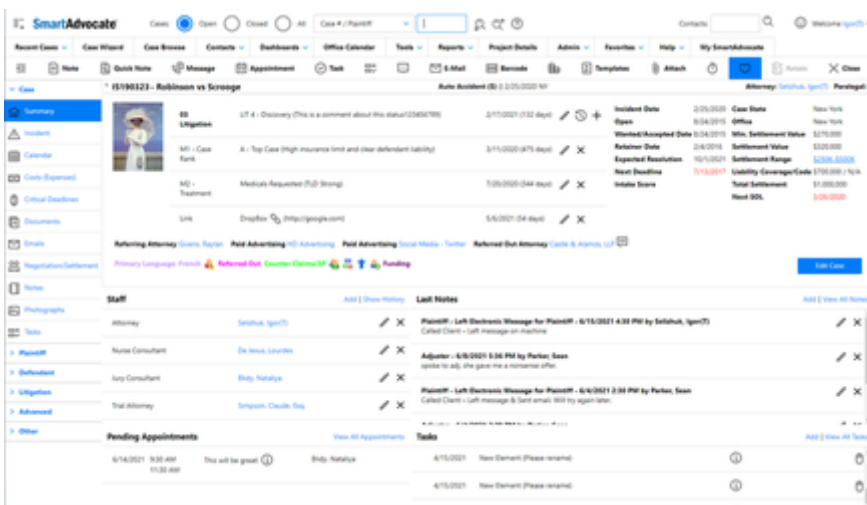
Themes

SmartAdvocate has a number of different themes that can be applied to give the system a different look. Below is an example of each theme.

DevEx



iOS



Material (Default)

SmartAdvocate Case # 1 Plaintiff

Auto Accident (2) 3/25/2021 NY

Attorney: **Seth A. Spert**, Plaintiff

Summary

- Case Name: Auto Accident (2)
- Case State: New York
- Office: New York
- Min. Settlement Value: \$75,000
- Max. Settlement Value: \$250,000
- Expected Resolution: 10/1/2021
- Settlement Range: \$250,000
- Liability Coverage Code: 070000 - 10%
- Total Settlement: \$1,000,000
- Next SCL: 3/26/2021

Staff

| Role | Name | Last Notes |
|------------------|----------------------|--|
| Attorney | Seth A. Spert | Plaintiff - Left Electronic Message for Plaintiff - 6/15/2021 4:30 PM by Seth A. Spert |
| Nurse Consultant | Dr. James Lourdes | Adjuster - 6/9/2021 9:36 PM by Parker, Sean |
| Jury Consultant | Willy Nantulye | Plaintiff - Left Electronic Message for Plaintiff - 6/16/2021 2:30 PM by Parker, Sean |
| Trial Attorney | Simpson, Charles Jay | Adjuster - 6/16/2021 2:28 PM by Parker, Sean |

Pending Appointments

| Date | Time | Notes | Staff |
|-----------|--------------------|---------------------|----------------|
| 6/14/2021 | 9:30 AM - 11:30 AM | This will be great! | Willy Nantulye |

Tasks

| Date | Task | Staff | Count |
|-----------|--|----------------|-------|
| 6/25/2021 | 30 Day Client Follow Up | Willy Nantulye | 0 |
| 10/1/2021 | Call Terry Ann Robinson back at (206) 802-8291 | Willy Nantulye | 0 |
| 3/16/2021 | Follow Up | Parker, Sean | 0 |
| 3/26/2021 | 30 Day Client Follow Up | Kristen Park | 0 |

MaterialCompact

SmartAdvocate Case # 1 Plaintiff

Auto Accident (2) 3/25/2021 NY

Attorney: **Seth A. Spert**, Plaintiff

Summary

- Case Name: Auto Accident (2)
- Case State: New York
- Office: New York
- Min. Settlement Value: \$75,000
- Max. Settlement Value: \$250,000
- Expected Resolution: 10/1/2021
- Settlement Range: \$250,000
- Liability Coverage Code: 070000 - 10%
- Total Settlement: \$1,000,000
- Next SCL: 3/26/2021

Staff

| Role | Name | Last Notes |
|------------------|----------------------|--|
| Attorney | Seth A. Spert | Plaintiff - Left Electronic Message for Plaintiff - 6/15/2021 4:30 PM by Seth A. Spert |
| Nurse Consultant | Dr. James Lourdes | Adjuster - 6/9/2021 9:36 PM by Parker, Sean |
| Jury Consultant | Willy Nantulye | Plaintiff - Left Electronic Message for Plaintiff - 6/16/2021 2:30 PM by Parker, Sean |
| Trial Attorney | Simpson, Charles Jay | Adjuster - 6/16/2021 2:28 PM by Parker, Sean |

Pending Appointments

| Date | Time | Notes | Staff |
|-----------|--------------------|---------------------|----------------|
| 6/14/2021 | 9:30 AM - 11:30 AM | This will be great! | Willy Nantulye |

Tasks

| Date | Task | Staff | Count |
|-----------|--|----------------|-------|
| 6/25/2021 | 30 Day Client Follow Up | Willy Nantulye | 0 |
| 10/1/2021 | Call Terry Ann Robinson back at (206) 802-8291 | Willy Nantulye | 0 |
| 3/16/2021 | Follow Up | Parker, Sean | 0 |
| 3/26/2021 | 30 Day Client Follow Up | Kristen Park | 0 |

Courts / Dockets

| Case Name | Case No. | Judge | Room |
|--|------------|--------------------------|-----------------------|
| Superior Court of Westchester, Indiana | 93285-2019 | Judge: Schneider, Judith | Part # 401 Room # 654 |

Pending Critical Deadlines

| Case Name | Answer Due | Created From |
|---------------------|------------|---------------------------------|
| Robinson, Terry Ann | 6/15/2021 | Created from SCL for Answer Due |
| Simpson, Charles | 6/30/2021 | Created from Discovery page |

MaterialCompact Dark

SmartAdvocate Case # 1 Plaintiff

Auto Accident (2) 3/25/2021 NY

Attorney: **Seth A. Spert**, Plaintiff

Summary

- Case Name: Auto Accident (2)
- Case State: New York
- Office: New York
- Min. Settlement Value: \$75,000
- Max. Settlement Value: \$250,000
- Expected Resolution: 10/1/2021
- Settlement Range: \$250,000
- Liability Coverage Code: 070000 - 10%
- Total Settlement: \$1,000,000
- Next SCL: 3/26/2021

Staff

| Role | Name | Last Notes |
|------------------|----------------------|--|
| Attorney | Seth A. Spert | Plaintiff - Left Electronic Message for Plaintiff - 6/15/2021 4:30 PM by Seth A. Spert |
| Nurse Consultant | Dr. James Lourdes | Adjuster - 6/9/2021 9:36 PM by Parker, Sean |
| Jury Consultant | Willy Nantulye | Plaintiff - Left Electronic Message for Plaintiff - 6/16/2021 2:30 PM by Parker, Sean |
| Trial Attorney | Simpson, Charles Jay | Adjuster - 6/16/2021 2:28 PM by Parker, Sean |

Pending Appointments

| Date | Time | Notes | Staff |
|-----------|--------------------|---------------------|----------------|
| 6/14/2021 | 9:30 AM - 11:30 AM | This will be great! | Willy Nantulye |

Tasks

| Date | Task | Staff | Count |
|-----------|--|----------------|-------|
| 6/25/2021 | 30 Day Client Follow Up | Willy Nantulye | 0 |
| 10/1/2021 | Call Terry Ann Robinson back at (206) 802-8291 | Willy Nantulye | 0 |
| 3/16/2021 | Follow Up | Parker, Sean | 0 |
| 3/26/2021 | 30 Day Client Follow Up | Kristen Park | 0 |

Courts / Dockets

| Case Name | Case No. | Judge | Room |
|--|------------|--------------------------|-----------------------|
| Superior Court of Westchester, Indiana | 93285-2019 | Judge: Schneider, Judith | Part # 401 Room # 654 |

Pending Critical Deadlines

| Case Name | Answer Due | Created From |
|---------------------|------------|---------------------------------|
| Robinson, Terry Ann | 6/15/2021 | Created from SCL for Answer Due |
| Simpson, Charles | 6/30/2021 | Created from Discovery page |

Metropolis

SmartAdvocate Case # 1519022 - Robinson vs Sroog

Summary

- Incident: 08/14/2021 10:00 AM - 10:00 AM
- Case Status: Open
- Case Type: Personal Injury
- Min. Settlement Value: \$270,000
- Max. Settlement Value: \$750,000
- Expected Resolution: 12/31/2021
- Settlement Range: \$200,000 - \$500,000
- Liability Coverage/Cover: \$750,000 / 10%
- Total Settlement: \$1,000,000
- Net Settlement: \$170,000

Staff

- Attorney: [Seth A. Jacobson](#)
- Paralegal: [Sara L. Jacobson](#)

Pending Appointments

| Date | Time | Appointment | Location |
|------------|----------|-------------|-----------------------------------|
| 10/14/2021 | 10:00 AM | Appointment | 100 West 4th Street, New York, NY |
| 10/14/2021 | 10:00 AM | Appointment | 100 West 4th Street, New York, NY |
| 10/14/2021 | 10:00 AM | Appointment | 100 West 4th Street, New York, NY |

Tasks

- 10/14/2021 10:00 AM: Call
- 10/14/2021 10:00 AM: Call back
- 10/14/2021 10:00 AM: Call back
- 10/14/2021 10:00 AM: Answer

Pending Critical Deadlines

| Deadline | Created From | Due Date |
|---------------------------------------|------------------------------|------------|
| Settlement Conference | Created from SOA for SBC Due | 10/14/2021 |
| Discovery | Created from SOA for SBC Due | 10/14/2021 |
| Answer | Created from SOA for SBC Due | 10/14/2021 |
| Discovery | Created from SOA for SBC Due | 10/14/2021 |

Metropolis Blue

SmartAdvocate Case # 1519022 - Robinson vs Sroog

Summary

- Incident: 08/14/2021 10:00 AM - 10:00 AM
- Case Status: Open
- Case Type: Personal Injury
- Min. Settlement Value: \$270,000
- Max. Settlement Value: \$750,000
- Expected Resolution: 12/31/2021
- Settlement Range: \$200,000 - \$500,000
- Liability Coverage/Cover: \$750,000 / 10%
- Total Settlement: \$1,000,000
- Net Settlement: \$170,000

Pending Critical Deadlines

| Deadline | Created From | Due Date |
|---------------------------------------|------------------------------|------------|
| Settlement Conference | Created from SOA for SBC Due | 10/14/2021 |
| Discovery | Created from SOA for SBC Due | 10/14/2021 |
| Answer | Created from SOA for SBC Due | 10/14/2021 |
| Discovery | Created from SOA for SBC Due | 10/14/2021 |

Moderno

SmartAdvocate Case # 1519022 - Robinson vs Sroog

Summary

- Incident: 08/14/2021 10:00 AM - 10:00 AM
- Case Status: Open
- Case Type: Personal Injury
- Min. Settlement Value: \$270,000
- Max. Settlement Value: \$750,000
- Expected Resolution: 12/31/2021
- Settlement Range: \$200,000 - \$500,000
- Liability Coverage/Cover: \$750,000 / 10%
- Total Settlement: \$1,000,000
- Net Settlement: \$170,000

Tasks

- 10/14/2021 10:00 AM: 30 Day Client Follow Up
- 10/14/2021 10:00 AM: Call Terry Allen & Robinson back on 990-800-5291
- 10/14/2021 10:00 AM: Follow-up
- 10/14/2021 10:00 AM: 30 Day Client Follow Up

Pending Critical Deadlines

| Deadline | Created From | Due Date |
|---------------------------------------|---------------------------------|------------|
| Settlement Conference | Created from SOA for Answer Due | 10/14/2021 |
| Discovery | Created from Discovery page | 10/14/2021 |

Office2010 Black

The screenshot displays the SmartAdvocate software interface for a case titled '888 Pre SA'. The interface is organized into several sections:

- Case Information:** Includes case name, dates, and status indicators.
- Case Details:** Lists parties involved, such as 'A - Plaintiff' and 'B - Defendant', along with their respective attorneys.
- Case Summary:** Provides a high-level overview of the case, including the court and judge.
- Case History:** Shows a timeline of events, including filings and court dates.
- Case Documents:** Lists various documents related to the case, such as pleadings and evidence.
- Case Settings:** Allows for configuration of case-specific parameters.

Office2010 Blue

This screenshot is identical to the one above, showing the SmartAdvocate software interface for the '888 Pre SA' case. It provides a comprehensive view of the case details, including party information, case history, and document management.

Office2010 Silver

This screenshot is identical to the previous ones, displaying the SmartAdvocate software interface for the '888 Pre SA' case. The interface shows the same layout of case information, details, summary, history, documents, and settings.

Office365

The screenshot displays the SmartAdvocate interface for a case titled "Robinson vs Sorce". The interface is divided into several sections:

- Case Summary:** Shows case details such as "89 Litigation", "UT 4 - Discovery (file a comment about the status)", and "Auto Resolution ID: 1275100214". It includes a table of dates and actions, such as "Incident Date: 2/17/2019", "Case State: New York", and "Settlement Value: \$175,000".
- Staff:** Lists attorneys and staff members, including "Sofia, Ignoffo" and "Debra, Lichten".
- Tasks:** A list of tasks with due dates and assignees, such as "9/25/2018: 30 Day Client Follow Up" and "10/1/2018: Call Temp Ann Robinson back on 800-802-5291".
- Pending Appointments:** Shows upcoming appointments, including "9/16/2017: 9:30 AM: This will be great" and "9/16/2017: 11:30 AM: Billie, Natalie".
- Counts / Dockets:** Displays counts for various categories like "Superior Court of Missouri" and "Judge: Catherine, Lichten".
- Pending Critical Deadlines:** Lists critical deadlines, such as "Robinson, Temp Ann" and "Answer Due" with a due date of "9/16/2017".

Youthful

This screenshot shows the SmartAdvocate interface for the same case, "Robinson vs Sorce", but with a different layout and color scheme. The sections are:

- Case Summary:** Similar to the first screenshot, showing case details and a table of dates and actions.
- Staff:** Lists staff members, including "Sofia, Ignoffo" and "Debra, Lichten".
- Tasks:** Lists tasks with due dates and assignees, such as "9/25/2018: 30 Day Client Follow Up".
- Pending Appointments:** Shows appointments, including "9/16/2017: 9:30 AM: Appointment" and "9/16/2017: 11:30 AM: Appointment".
- Counts / Dockets:** Displays counts and docket information.
- Pending Critical Deadlines:** Lists critical deadlines, such as "Answer Due" and "Settlement Due".

How To Set Your 'Top Search' Defaults in User Preferences

User Permission Groups

The various staff members of your firm are likely to have very different access needs in SmartAdvocate. For example, you will almost certainly want to limit administrative access to your senior staff and/or IT department, and you might want to keep low-level associates from viewing cases that they are not working on. SmartAdvocate handles access through user permission groups. Users are assigned to one or more permission groups (in the [Users](#) administrative page), and those permission groups determine what access the users have to individual pages and cases. If a user belongs to multiple permission groups, that user's access to a given page or case is determined by the group with the most permissions for that page or case; e.g. if a user belongs to a group with Read Only permission for some page and another group with Read Write permission for that page, the user has Read Write permission for the page. The User Permission Groups administrative page is where you can add permission groups and manage their access to pages and cases. The page contains a table listing all of the permission groups in the SmartAdvocate system. The table's columns are:

- Group name: The name of the permission group.
- Case Access Restrictions: The categories of restrictions that determine whether the permission group has access to a given case. See below.
- Actions: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can also create a new permission group in this page. The add/edit form has a text input field for the name of the group, and the rest of the form is mainly divided into two sections. The top section is for page permissions and the bottom is for case permissions. The page permissions section consists of a dropdown labeled "Bulk change" and a table listing all of the pages in SmartAdvocate. The table's columns are:

- Page title: The name of the page.
- Page url: The URL of the page. Only includes parameters after the base URL when the parameter is used to distinguish between entirely different pages (e.g. different types of reports, or different UDF pages).
- Page group: The area of the SmartAdvocate site where the page is found. Somewhat approximate.
- Page access: What level of access the permission group has to the page. This field contains a dropdown with seven choices: No Access, Read Only, Read Add Edit, Read Add, Read Add EditMy, Read Add EditMyNew, and Full Access.
 - No Access: Users cannot reach the page or see it in menus.
 - Read Only: Users can reach the page and see it in menus, but they cannot add, change, or delete records on that page.

- Read Add Edit: Users can read any records, add or change records, but cannot delete them.
- Read Add: Users can read any records, add new records, but cannot edit any existing records.
- Read Add EditMy: Users can read any records, add new records, but can only edit records they created.
- Read Add EditMyNew: Users can edit records they created, but only for a limited period of time. This time can be set in Admin -> System Parameters -> User Permission.
- Full Access: Users can perform any action on that page.
- The Page Access column of the User Permission Group page is the only portion of the table that is user editable.

The Bulk Change dropdown has the same choices as "Page access." This dropdown is used to change access to multiple pages simultaneously. To use the dropdown, use the table's filter tools to display only a subset of the available records. (A particularly useful example would be to filter the table to only show pages in the page group Admin). Then select an option in the Bulk change dropdown. All of the records visible in the filtered table will have their page access set to whichever option you chose in Bulk change. Note: "Visible" refers to all records meeting the filter conditions. Even if records are not literally visible because you have to scroll down to see them, or even if records are on a different table page than the one currently showing when you select Bulk change, they will be affected by Bulk change. Only those pages that do not meet the filter conditions will be unaffected by a bulk change. The Case Access Restrictions section consists of the following fields:

- Two radio buttons, labeled "Allow access to all cases" and "Allow access to cases that fit ANY of the following." If the first button is selected, the specific characteristics of a given case do not affect whether the permission group may view the pages for that case, and the rest of the case permissions section is ignored by the SmartAdvocate system. If the second button is selected, the rest of the section is used to set limits on which cases the permission group may view. The description of the rest of this section assumes that the second button is selected.
- Assigned: A checkbox. If selected, users in the permission group may only view any case to which they personally are assigned as case staff.
- Types: A checkbox-select dropdown of case types. If any of the members of the dropdown are selected, users in the permission group may view any case belonging to one of the selected case types.
- Groups: A checkbox-select dropdown of case groups. If any of the members of the dropdown are selected, users in the permission group may view any case belonging to one of the selected case groups.
- Statuses: A checkbox-select dropdown of primary statuses. If any of the members of the dropdown are selected, users in the permission group may view any case currently in one of the selected statuses.
- Stages: A checkbox-select dropdown of stages. If any of the members of the dropdown are selected, users in the permission group may view any case currently in one of the selected stages.

Note: If one of the above four dropdowns has no items selected, the field will read "(All Case Types)" or "(All Case Groups)," etc. However, this is misleading. "(All Case Types)" does not mean users in the permission group may view all cases belonging to any case type (i.e. all cases, period); it actually means that users' ability to view a case is unaffected by that case's type. If, in an extreme case, the second radio button is selected, Assigned is not selected and no members of any of the four dropdowns are selected, users in the permission group will have no access to any cases at all. As with most add/edit forms, you must click the Update button to save any changes you make in any of the fields in this form. Even changes made using Bulk change are not automatically saved. Additionally, even changes that are saved generally do not take effect for a user they should affect until the next time that user logs out (or is automatically logged out) and logs back in.

The correlation between selections in the case permissions section and the Case Access Restrictions column of the User Permission Groups table is as follows: If the first radio button is selected, the column will contain the text "No Restrictions." Otherwise, the column will contain the text "Restricted to Assigned," followed by "Cases" if Assigned is selected, followed by a list of the dropdowns that have at least one item selected. So, for example, if Assigned were selected, three case groups were selected in Groups, and one stage were selected in Stages, the column would read, "Restricted to Assigned Cases, Groups, Stages."

| Group name | Case Access Restrictions | Actions |
|-----------------------|-------------------------------------|---------------------|
| Administrators | No Restrictions | [edit] [delete] [x] |
| Default | No Restrictions | [edit] [delete] [x] |
| Paralegals | No Restrictions | [edit] [delete] [x] |
| Reception | No Restrictions | [edit] [delete] [x] |
| File Room | No Restrictions | [edit] [delete] [x] |
| Intake | No Restrictions | [edit] [delete] [x] |
| Medical Records | No Restrictions | [edit] [delete] [x] |
| Attorneys | No Restrictions | [edit] [delete] [x] |
| Managing Attorneys | No Restrictions | [edit] [delete] [x] |
| Primary Paralegals | No Restrictions | [edit] [delete] [x] |
| Restricted Test | No Restrictions | [edit] [delete] [x] |
| Restricted Case Types | Restricted to Assigned Cases, Types | [edit] [delete] [x] |
| Basic Staff | No Restrictions | [edit] [delete] [x] |

| Title | URL | Group | Use/Configuration |
|--|---|------------|---|
| Accounting | | Tools | Accounting (a future feature to be installed) |
| Accounting | /SaRx/Accounting.aspx | Accounting | Accounting (a future feature to be installed) |
| Accounting Integration | /SaRx/AccountingIntegration.aspx | Accounting | Accounting Integration with third-party application |
| Add Contact | javascript:AddContactMaster(); | Contacts | Add a contact to the database |
| Add current page to Favorites | javascript:AddFavorite(); | Favorites | Add the current page to your list of favorites |
| Adjourned/Canceled Appointments Report | /SAReports.aspx?reportid=CanceledAdjournedAppointment /CanceledAdjournedCalendarReport | Reports | Reports for Adjourned/Cancelled appointments |
| Admin | | Home | Access to the Administrative Functions (for set up and configuration) |

| | | | |
|---------------------------------------|--|--------------------------|--|
| Adverse Exams | /Medical_Provider_AdverseExam.aspx | Plaintiff | Exams conducted by the opposition (e.g., DMLs) |
| Advertisement Campaigns | /Dashboard_AdvertisementCampaigns.aspx | Financial Dashboards | Financial Dashboards to display Financial Information such as Advertisement Campaigns, etc. |
| Advertisement Campaigns | /AdvertisementCampaign.aspx | Admin | Set up Advertisement sources and amount spent per period for that source |
| Advertisement Campaigns | /SAReports.aspx?reportid=AdvertisementReport /AdvertisementReport | Reports | Reports for Advertisement Campaigns |
| All Contacts | /All_contacts.aspx | Other | List all contacts |
| All Insurance | /Insurance.aspx | Other | All insurance for all parties |
| All Vehicles | /Vehicle.aspx?AllParties=true | Other | Vehicle information for both parties |
| Appeals | /Litigation_Appeals.aspx | Litigation | Access to the Appeals page in the Litigation Section |
| ARB/Mediations | /ArbitrationMediation.aspx | Other | Arbitration/Mediatio Page |
| Attorney File Review Overdue | /DashboardStaffReview.aspx?NoteTypeCriteria=81 | Overdue Dashboards | Dashboard that displays Attorney File Reviews that are overdue |
| Attorney Performance | /Attorney_Dashboard.aspx | Performance Dashboards | Dashboard that shows Attorney Performance (cases assigned, etc.) |
| AttorneyPerformance Report | /SAReports.aspx?reportid=AttorneyPerformanceReport /AttorneyPerformanceReport | Staff Management Reports | Reposr that shows Attorney Performance |
| Attorneys | /Plaintiff_Attorney.aspx | Plaintiff | Attorney information for Plaintiff(s) on the Plaintiffs' page (attorneys for plaintiffs other than our firm) |
| Attorneys | /Defendant_Attorney.aspx | Defendant | Attorney information for defendant(s) |
| Automated Procedure Management | /AutomationCampaigns.aspx | Admin | Automated Procedures management page. Create, Edit and Assign Automated Procedures |
| Bankruptcy | /Bankruptcy.aspx | Other | Bankruptcy Page - shows bankruptcy information for the parties |
| Barcode Generation | /CoverGeneration.aspx | General | Allows the creation of a barcode page for document scanning |
| Calendar | /CaseCalendar.aspx | General | Access to the Office Calendar |
| Calendar Report | /SAReports.aspx?reportid=CalendarReport /CalendarReportAllActivities | Calendar Reports | Reports generated from the calendar |
| Calendar Report Advanced | /SAReports.aspx?reportid=CalendarReport /CustomCalendarReport | Calendar Reports | More detailed reports for specific information generated from the calendar |
| Calendar Reports | | Calendar Reports | Access to Reports generated from the calendar |
| Callers Info | /CallersInfo.aspx | Integrations | Information from specific callers generated through integrations |
| Callers Report | /excel_report_new.aspx | Legacy Reports | |
| Caption | /Case_Caption.aspx | General | Access to the Case Caption Page |
| Case | | Home | |
| Case | | | |
| Case Browse | /Case_Browse.aspx | Admin | Access to the case browse screen to generate lists based on available filters |
| Case Browse | /SAReports.aspx?reportid=CaseBrowse/CaseBrowse | Reports | Reports that can be generated based on filters saved in case browse |
| Case Browse Results | /Case_Browse_Results.aspx | Home | Results generated by filters set in case browse |
| Case Expenses With Interest Report | /SAReports.aspx?reportid=CaseExpensesWithInterest /CaseExpensesWithInterest | Reports | Report of case expenses (disbursements) with interest applied |
| Case Intake Data | /CaseIntakeData.aspx | Integrations | Case information/data captured from Intake generate through Integrations |
| Case Menu Configurator | /CaseMenuConfigurator.aspx | Admin | Allow access to change the left menu - Available from the Case's Summary Screen |
| Case Minimum Settlement Value Not Set | /SAReports.aspx?reportid=CaseMinSettlementValueNotSetReport /CaseMinValueReport | Reports | Reports generated from the minimum settlement value set per case |
| Case Notes | /SAReports.aspx?reportid=CaseNotesReport /CaseNotesReport | Reports | Reports of notes entered in cases |
| Case Review | /CaseReview.aspx | Dashboards | Dashboard which displays cases that have been reviewed by attorney and supervisor |
| Case Settlement Values | /SAReports.aspx?reportid=Case Settlement Value /CaseSettlementValues | Financial Reports | Report that shows settlement over the specified date range |
| Case Statistics | /SAReports.aspx?reportid=CaseStatistics/CaseStatistics | Reports | Reports that shows new intakes, settlements and Advertisement |

| | | | |
|--|---|--------------------------|--|
| | | | for the time period specified |
| Case Statistics | /dashboard_CaseStatistics.aspx | Dashboards | Dashboard that shows new intakes, settlements and Advertisement for the time period specified |
| Case Status Change | /SAReports.aspx?reportid=CaseStatusChangeReport /CaseStatusChangeReport | Reports | Shows cases with status changed for the period selected |
| Case Time Tracking | /SAReports.aspx?reportid=CaseTimeTrackingReport /CaseTimeTrackingReport | Reports | Report of time entered for cases over the period designated |
| Case Type | /CaseType.aspx | Admin | Case Type setup |
| Case UDF | /UDFs.aspx | General | User Defined Fileds created on the Case UDF page |
| Case UDF | /UDFs.aspx?UDFFor=Case | Other | |
| Case Value | /CaseValue.aspx | Other | A combination of data entered on various screens that will show special damages and, certain expenses and certain liens |
| Case Values | /SAReports.aspx?reportid=CaseValues/CaseValues | Financial Reports | Report of the Case Values for Special Damages, etc. |
| Case Wizard | /Case_Wizard.aspx | Home | Used to create a new matter/case |
| Case Wizard | /sarx/CaseWizard.aspx | Home | Acces to enter/create a new matter/case |
| Cases | | Favorites | A list of cases that has bee marked as favorite |
| Cases by Case Type | /SAReports.aspx?reportid=CaseByCaseTypeSummary /CasesByCaseTypeSummaryRpt | Reports | Report of list of cases sorted by Case Type |
| Cases In Status | /SAReports.aspx?reportid=CasesInStatus/CasesInStatus | Reports | Report of cases in a specific status |
| Cases In Status | /Dashboard_Sol_V2_ChaseCall.aspx?Criteria=StatusBased | Dashboards | Dashboard show cases in a specific status |
| Cases With Disbursement Exceeding Limit Report | /SAReports.aspx?reportid=CaseDisbursementExceededReport /CaseDisbursementExceededReport | Financial Reports | Report that shows cases where the case costs/Disbursements exceed the limit set b y the firm |
| Cases With Long Time In Status | /SAReports.aspx?reportid=LongStatus/LongStatusCases | Staff Management Reports | Report of cases that have been in a specific status longer than the time designated by the firm to be in that status |
| Cases With No Recent Activity | /SAReports.aspx?reportid=CasesWithNoActivity /CasesWithNoActivity | Staff Management Reports | Report of cases with no recent activity (notes, documents, appointments, tasks, etc.) |
| Cases Without Incident Date | /SAReports.aspx?reportid=CasesWOIncidentDate/Cases Without IncidentDate | Reports | Repost of cases where no incident date has been entered |
| Change Password | /Change_Password.aspx | Admin | Access to change user password |
| Chart of Accounts | /ChartOfAccounts.aspx | Admin | List of accounts for accounting (future feature) |
| Check Requests For Review | /CheckRequestsForReview.aspx | Tools | List of checks that have been marked for review peior to being sent to QuickBooks for check disbursement |
| Checks Audit Trail Report | /SAReports.aspx?reportid=ChecksAuditTrailReport /ChecksAuditTrailReport | Financial Reports | Audit trail for checks showing change detail and individual who made the change |
| Checks Received Report | /SAReports.aspx?reportid=ChecksReceivedReport /ChecksReceivedReport | Financial Reports | Report of settlement checks received |
| Client Birthday Report | /SAReports.aspx?reportid=ClientBirthdayReport/Birthday Report Closed Cases With Settlement Status | Calendar Reports | Report of client birthdays for the month |
| Client Contact Overdue | /Dashboard_Sol_V2_ClientContact.aspx | Overdue Dashboards | Dashboard that shows list of cases where the client has not been contacted by the Paralegal within the time designated by the firm |
| Client Portal | /CaseClientPortal.aspx | General | Access to the Client Ports to sent token/invitation to clients, etc. |
| Client Portal Administration | /ClientPortalAdmin.aspx | Admin | Access to the Client Ports for administration and set up |
| Close Reason Statistics | /ClosedCasesStats.aspx | Dashboards | Dashboard that shows list of cases closed and the reson therefore |
| Closed Cases Analysis | /DashboardClosedCasesReport.aspx | Financial Dashboards | Analysis of closed cases by staff and the fees generated, etc. |
| Closed Cases With No Fee | /SAReports.aspx?reportid=DisbursmentforClosedCasesWithNoSettlment /DisbursementofClosedCasesNoSettlement | Reports | Report of cases that have been closed with no firm/attorney fee generated |
| Closed Reason Statistics | /SAReports.aspx?reportid=CloseReasonStatistics /CloseReasonStatistics | Intake Reports | Reports showing cases that have been closed and the reason they were closed with percentages |
| Codicil Information | /Surrogate_WillInformation.aspx?CodicilInformation=C | Surrogate | Amendment/Codicil to Will of the client |
| Comparative Yearly Statistics for Intake | /SAReports.aspx?reportid=IntakeMonthlyReport /IntakeMonthlyReport | Intake Reports | Report of cases entered in intake with a comparative yearly analysis |
| Complaints/Answers | /Litigation_ComplainAnswers.aspx | Litigation | List of complain and answeere entered on the Critical Deadlines page and shown in a summary on the Litigation Page |

| | | | |
|---------------------------------|---|-------------------------------|--|
| Conflict Report | /SAReports.aspx?reportid=ConflictReport/ConflictReport | Intake Reports | Report of cases showing possible conflicts (same name, same address, same phone numbers, etc.) |
| Contact Related Add | /Contact_RelatedAdd.aspx | General | Add contact |
| Contact Rename Report | /SAReports.aspx?reportid=ContactRenameReport/ContactRenameReport | Staff Management Reports | Report of cases where the contact name has been modified |
| Contact Search | /Contact_List_New.aspx | Contacts | Search contact |
| Contact Select | /Contact_SelectAdd.aspx | | |
| Contacts | | Home | Search contacts |
| Copy/Merge Cases | /CopyAndMergeCases.aspx | Tools | Copy a case or merge two or more cases |
| Counter Claims/3P | /Counter_Claims3P.aspx | Litigation | Third-Party Litigation |
| Court | /Case_Court.aspx | General | Court information (Court name, Docket Number, Judge, etc.) |
| Court Rules | /CourtRules.aspx | General | Integration through Calendar Rules |
| Court UDFs | /UDFs.aspx?UDFFor=Court | Litigation | User Defined Files that will display on the Court Page |
| Create Document | /Create_doc.aspx | | Create documents |
| Created/Modified Contact Search | /SAReports.aspx?reportid=ContactSearchReport/ContactSearchReport | Staff Management Reports | Report of contacts that have been created or modified for the period selected |
| Critical Comments | /Critical_Comments.aspx | General | Critical Comment that can be set to appear on the case as a popup when the user tries to access the case |
| Critical Deadline Report | /SAReports.aspx?reportid=Critical Deadline Report/Critical Deadline Report | SOL/Critical Deadline Reports | Report of deadlines |
| Critical Deadlines | /Case_SOL.aspx | General | Access to the critical deadlines page of the case |
| Custom View Page 1 | /CustomView.aspx?PageID=1 | Other | Pages/Panels that can be created to display in the case show information typically populated via merge codes |
| Custom View Page 2 | /CustomView.aspx?PageID=2 | Other | Pages/Panels that can be created to display in the case show information typically populated via merge codes |
| Custom View Page 3 | /CustomView.aspx?PageID=3 | Other | Pages/Panels that can be created to display in the case show information typically populated via merge codes |
| Custom View Page 4 | /CustomView.aspx?PageID=4 | Other | Pages/Panels that can be created to display in the case show information typically populated via merge codes |
| Custom View Page 5 | /CustomView.aspx?PageID=5 | Other | Pages/Panels that can be created to display in the case show information typically populated via merge codes |
| Daily Cases Opened | /SAReports.aspx?reportid=DailyCasesOpened/DailyCasesOpened | Intake Reports | Intake Report show daily cases opened |
| Daily Single Event Cases Opened | /SAReports.aspx?reportid=SingleEventIntakePattern/SingleEventIntakePatterns | Intake Reports | Intake Report show daily cases opened |
| Dashboard Designer | /CustomDashboards.aspx?Mode=Designer | Dashboards | Administrative function that allows the design of custom dashboards |
| Dashboard Group 1 | /CustomDashboards.aspx?Group=1 | Dashboards | Administrative function that allows the design of custom dashboards |
| Dashboard Group 2 | /CustomDashboards.aspx?Group=2 | Dashboards | Administrative function that allows the design of custom dashboards |
| Dashboard Group 3 | /CustomDashboards.aspx?Group=3 | Dashboards | Administrative function that allows the design of custom dashboards |
| Dashboard Group 4 | /CustomDashboards.aspx?Group=4 | Dashboards | Administrative function that allows the design of custom dashboards |
| Dashboard Group 5 | /CustomDashboards.aspx?Group=5 | Dashboards | Administrative function that allows the design of custom dashboards |
| Dashboard Teams | /TeamManagement.aspx | Admin | |
| Dashboard Viewer | /CustomDashboards.aspx?Mode=Viewer | Dashboards | Dashboard that shows graphical display of Open Cases, Settlements, Leads by Groups, Lead Demographics, Lead Geographics, User Activity |
| Dashboard(Old) | /Dashboard_Sols.aspx | Admin | |
| Dashboards | | Home | Access to Dashboards |
| Death Compromise | /DeathCompromise.aspx | Surrogate | Procedure in Probate Court |
| Death Compromise Dist. | /DCDistribution.aspx | Surrogate | Procedure in Probate Court |
| Decedent Information | /SurrogateDecedentInformation.aspx | Surrogate | Information for decedent entered on the Surrogate/Probate Court page |

| | | | |
|--|--|------------------------|--|
| Defendant | | Case | Defendant Main Section on the Summary Screen |
| Defendant Notes | /CaseNotesNew.aspx?NoteType=Defendant | Defendant | Notes page showing defendants notes |
| Defendant UDFs | /UDFs.aspx?UDFFor=Defendant | Defendant | User Defined Fields created for the defendants' page |
| Demand Production | /Dashboard_DemandProduction.aspx | Performance Dashboards | Dashboard showing settlement demands made for the period selected |
| Depositions | /Litigation_Deposition.aspx | Litigation | Depositions Page under the Litigation Section |
| Disbursement Report | /SAReports.aspx?reportid=DisbursementReport /DisbursementReport | Financial Reports | Report of case costs/Disbursements |
| Disbursements | /Case_Disbursement.aspx | General | Disbursements Page |
| Discovery | /Litigation_Discovery.aspx | Litigation | Discovery page under the Litigation Section |
| Distributees/Others | /Surrogate_Distributees.aspx | Surrogate | Distributees shown on the Surrogate/Probate information screen |
| Distribution Check Requests For Review | /DistributionCheckRequestsForReview.aspx | Tools | Dashboard uses to show checks that have been flagged for review that are populated to the special dashboard prior to approval to be sent to QuickBooks |
| Document Search Report | /SAReports.aspx?reportid=DocumentSearchReport /DocumentSearchReport | Reports | Report to show documents added to a case |
| Document Templates | /TemplateManagement.aspx | Admin | Access to the document templates used for document generation |
| Documents | /case_documents.aspx | General | Documents page in the case |
| Documents Search | /Document_Listing.aspx | Tools | System-wide document search |
| Email Cache | /EmailCache.aspx | Tools | (Future feature) |
| Email/Note Templates | /EmailTemplates.aspx | Admin | Create email templates |
| Emails | /case_documents.aspx?show=EmailsOnly | General | Emails page |
| Employment | /Plaintiff_Employment.aspx | Plaintiff | Plaintiff's Employment information |
| Evidence | /Evidence.aspx | Litigation | Evidence page on the Litigation Section |
| Evidence/Storage Report | /SAReports.aspx?reportid=EvidenceStorage /EvidenceStorage | Reports | Report showing physical evidence being stores |
| Expense Analysis Report | /SAReports.aspx?reportid=ExpenseAnalysisReport /ExpenseAnalysisReport | Financial Reports | Report showing comparison of case expenses to recovery |
| Expert | /Expert_Details.aspx | Litigation | Expert page on the litigation section |
| Expert UDFs | /UDFs.aspx?UDFFor=Expert | Litigation | User Defined Filed for Expert |
| Favorites | | Home | List of filters saved |
| Fees Awarded | /FeesAwarded.aspx | General | Page for entry of fees awarded in Social Security/Disability, Workers Comp cases, etc. |
| Fees Deposited | /SAReports.aspx?reportid=FeeDepositReport /FeesDepositedReport | Financial Reports | Report of Firm fees deposited from settlements |
| Fees Outstanding | /SAReports.aspx?reportid=FeeOutStanding /FeesOutstanding | Financial Reports | Report of Firm fees earned from settlements but not yet deposited (settlement checks not yet received) |
| Filters | | Favorites | Access to saved filters (Calendar, favorite cases, etc.) |
| Financial Dashboards | | Dashboards | Financial Dashboards (settlements, advertisement campaigns, etc.) |
| Financial Reports | | Reports | Financial Reports (Settlements, etc.) |
| Funding | /Funding.aspx | Other | Page for pre or post-settlement funding requests |
| Funding Report | /SAReports.aspx?reportid=FundingReport/FundingReport | Financial Reports | Report of funding requests/funding made |
| General | | Case | |
| Hearing | /LitigationHearing.aspx | Litigation | Hearing page under the Litigation section (Workers Comp., etc.) |
| Help | /help/default.htm | Home | Access to online user help for SmartAdvocate |
| Home | | | (Future feature) |
| Hourly Call Patterns | /SAReports.aspx?reportid=Intake Pattern /IntakePatternReport | Intake Reports | "Call Patters" (Intakes) done over a specified period |
| Import Case/Contact | /ImportCaseContacts.aspx | | Import case contacts from spreadsheet |
| Import/Export Cases | /ImportCase.aspx | | Import or Export case information to a spreadsheet |
| Incident | /Case_Incident.aspx | General | The incident Page (initially completed during intake) |
| Incident Date/State | /Case_Incident.aspx#Incident | General | The incident date (date of accident) |
| Incident Information | /SAReports.aspx? | Staff | Report of any changes made to information on the Incident page |

| | | | |
|---------------------------------|--|------------------------|--|
| Changed Report | reportid=IncidentInformationChangedReport /IncidentInformationChangedReport | Management Reports | |
| Incomplete Cases | /Incomplete_Cases_New.aspx | Tools | A log of "cases/intakes" where the Case Wizard (Intake) was commenced but not completed where a new case/new matter was created |
| Injuries | /Case_Injury.aspx | Plaintiff | Injuries page for plaintiff |
| Injuries-Prior | /Medical_Provider_Priorsubsequentinjuries.aspx | Plaintiff | Page where "prior" injuries (injuries of the plaintiff/claimant that occurred before the incident at issue) |
| Insurance | /Plaintiff_Insurance_Company.aspx | Plaintiff | Insurance informatin for the plaintiff |
| Insurance | /Defendants_Insurance_Company.aspx | Defendant | Insurance information for the defendant |
| Insurance | /Plaintiff_Insurance_Company.aspx?Defendant=True | Defendant | Insurance information for the defendant |
| Insurance Company Report | /SAReports.aspx?reportid=Insurance Company Report /Insurance Company Report | Reports | Report of insurance companies and settlements made by those companies |
| Intake Analysis | /SAReports.aspx?reportid=IntakeAnalysis /IntakeAnalysisCount | Intake Reports | Intake data showing leads from applicable sources, leads by case group, and optional settlement information generally defaulted for the last 24 hours |
| Intake Dashboard | /DashboardIntake.aspx | Performance Dashboards | Dashboard showin intake statistics, including leads generated, conversion percentage, signed up leads, and referred out leads for the period selected |
| Intake Follow Up Dashboard | /Dashboard_Sol_V2_ChaseCall.aspx | Dashboards | Dashboard showing cases in the intake stage where the client has not yet been retained |
| Intake Performance | /DashboardIntakeReport.aspx | Performance Dashboards | Dashboard showing intake statistics, including leads generated, conversion percentage, signed up leads, and referred out leads for the period selected |
| Intake Performance Report | /SAReports.aspx?reportid=IntakePerformanceReport /IntakePerformanceReport | Intake Reports | Report showing intake statistics, including leads generated, conversion percentage, signed up leads, and referred out leads for the period selected |
| Intake Reports | | Reports | Access to the Intake Reports |
| Intake Review | /IntakeReview.aspx | Dashboards | Dashboard showing cases in the intake stage that have been marked to be rejected, but need to be reviewed by a supervisor |
| Intake Statistics | /Dashboard_NewCases.aspx | Dashboards | Dashboard showing graphical rendition of intake statistics, by source and case type year to date and month over month for the past four years |
| Integration Page 1 | /Integration1.aspx | Other | Third Party Integrations |
| Integration Page 2 | /Integration2.aspx | Other | Third Party Integrations |
| Integration Page 3 | /Integration3.aspx | Other | Third Party Integrations |
| Integration Page 4 | /Integration4.aspx | Other | Third Party Integrations |
| Integration Page 5 | /Integration5.aspx | Other | Third Party Integrations |
| Integrations | | Tools | |
| Investigations | /Investigations.aspx | General | Third Party Investigationss |
| Item Templates | /WorkPlanTemplatesAdmin.aspx | Work Plans | SmoartAdvocate WorkPlans (Create, modify, assign) |
| Last Modified Note Report | /SAReports.aspx?reportid=LastModifyBy/Last Modified By Report | Reports | Report showing notes last modified |
| Lawyer Referral By Closing date | /SAReports.aspx?reportid=LawyerReferralSource /LawyerReferralSource | Reports | Repoirt showing referral by attorney |
| Lead Analysis Report | /SAReports.aspx?reportid=LeadAnalysisReport /LeadAnalysisReport | Intake Reports | Intake Report showinggraphical rendition of lead by gender, age and case group for the period selected |
| Legacy Dashboards | | Dashboards | |
| Legacy Reports | | Reports | |
| Letter of Administration | /Surrogate_Letter_Of_Admin.aspx | Surrogate | Letters of administration from Probate/Surrogate Court |
| Lien Report | /SAReports.aspx?reportid=Lien Report/LienReport | Financial Reports | Financial Report showing liens in cases |
| Lien Tracking | /Plaintiff_LienTracking.aspx | Plaintiff | Page where liens are entered in the case |
| Lienor Report | /SAReports.aspx?reportid=LienorCreationReport /LienorCreationReport | Reports | Report of liens in cases |
| Links | | Favorites | Links for URLs or pages outside of SmartAdvocate |
| Litigation | | Case | The Litigation Page |
| Litigation Stage | /Dashboard_Sol_V2_LigNew.aspx | Legacy Dashboards | |
| Litigation Stage | /StageDashboard.aspx?stage=2 | Stage | Dashboard showing cases in the Litigation Stage |

| | | | |
|--|--|--------------------------|--|
| | | Dashboards | |
| Manage Favorites | /CaseFavorite.aspx | Favorites | Access to manage the user lists of favorites (filters, etc.) |
| Map Cases | /MapCases.aspx | Home | Map showing geographic location of plaintiffs based on their address |
| Map Dashboard | /MapsIntegration.aspx | Dashboards | Dashboard showing Map showing geographic location of plaintiffs based on their address |
| Mass Contact Import | /MassContactImport.aspx | Tools | Import tool to import contacts in bulk from spreadsheet |
| Mass Document Upload | /Document_Scanning.aspx | Tools | Upload tool to upload multiple documents to a case simultaneously |
| Mass Emailing | /MassEmail.aspx | Tools | Tool to send multiple emails simultaneously |
| Mass Mailing | /Mass_Mailing.aspx | Tools | Tool to send document to multiple plaintiffs simultaneously |
| Mass Sending Errors | /MassSendingErrors.aspx | home | Page that logs error from mass sending operations |
| Mass Texting | /MassSMS.aspx | Tools | Tool to send text messages in bulk to multiple plaintiffs |
| Mass Time Tracking Entry | /MassTimeEntry.aspx | Tools | Page that allows the entry of time tracking information to multiple cases simultaneously |
| MDL Cases | /MDL.aspx | Other | List of cases in Multi District Litigation |
| Medical Bill Vs Policy Limit | /SAReports.aspx?reportid=MedicalBillVsPolicyLimits /MedicalBillVsPolicyLimits | Reports | Report showing medical bills and policy limits in the case |
| Medical Chronology | /Plaintiff_Medical_Chronology.aspx | Plaintiff | Medicals chronology for treatment by the medical providers |
| Medical Provider Referral Report | /SAReports.aspx?reportid=MedicalProviderReferralReport /MedicalProviderReferralReport | Medical Reports | Report of cases where the firm referred clients to those providers |
| Medical Providers | /Plaintiff_Medical_Provider.aspx?current=true | Plaintiff | Page where medical providers for the plaintiff are entered (treatment for "current" injuries) |
| Medical Providers- Prior | /Plaintiff_Medical_Provider.aspx?Prior=true | Plaintiff | Page where medical providers for prior treatment are entered |
| Medical Record Request Types | /MedicalRecordType.aspx | Admin | Types of medical records requests (hospital records, pharmacy records, MRI, etc.) |
| Medical Records Request Report | /SAReports.aspx?reportid=ExternalMedicalRequests /ExternalMedicalRequests | Medical Reports | Report of medical records requests made |
| Medical Records Requests (external) | /Dashboard_MedicalRequests.aspx?Ext=True | Dashboards | Dashboard showing medical records requests made and the records have not been received |
| Medical Records Requests (internal) | /Dashboard_MedicalRequests.aspx?Ext=False | Dashboards | Dashboard showing medical records requests that have been logged to the case, but not yet sent out |
| Medical Records Requests Summary Report | /SAReports.aspx? reportid=MedicalRecordsRequestsSummary /MedicalRecordsRequestsSummary | Medical Reports | Summary Report of medical records request made |
| Medical Records Retrieval Performance Report | /SAReports.aspx? reportid=MedicalRecordsRetrievalPerformanceReport /MedicalRecordsRetrievalPerformanceReport | Medical Reports | Report of medicalrecords request made through retrieval service and received by date range |
| Medical Records Update Report | /SAReports.aspx?reportid=MedicalRecordsUpdateReport /MedicalRecordsUpdateReport | Medical Reports | Report of update requests for medical records from retrieval service |
| Medical Testing | /MedicalTesting.aspx | General | Page showing test ordered by the medical provider |
| Medical Visits Report | /SAReports.aspx?reportid=MedicalVisitsReport /MedicalVisitsReport | Medical Reports | Report of visits by provider for the case |
| Missing Barcoded Documents | /SAReports.aspx?reportid=MissingBarcodedDocuments /MissingBarcodedDocuments | Reports | Report of documents that were scanned without a barcode cover page |
| Modified Notes Report | /SAReports.aspx?reportid=ModifiedNotesReport /ModifiedNotesReport | Staff Management Reports | Report of notes that have been modifies by staff |
| Money In Trust Account | /SAReports.aspx?reportid=MoneyInTrustAccountReport /MoneyInTrustAccountReport | Financial Reports | Report of settlement funds being held in Trust |
| Monthly Intake Statistics | /SAReports.aspx?reportid=IntakeDetailedAnalysis /IntakeDetailedAnalysis | Intake Reports | Report of Intakes per month |
| Motions | /Litigation_Motion.aspx | Litigation | Motions Page under the Litigation Section |
| My Cases | /Dashboard_SoL_V2_ChaseCall.aspx?Criteria=AllCalls | Dashboards | Dashboard show list of open cases assigned to the staff member |
| My Medical Records Requests | /Dashboard_ParalegalMedicalRequests.aspx | Dashboards | Dashboard showing list of medical records requests assigned to the staff member |
| My SmartAdvocate | /MySmartAdvocatePanels.aspx | Home | Home page in SmartAdvocate |
| Negotiation Follow-Up | /Dashboard_SettlementNegotiation.aspx | Dashboards | Dashboard showing list of cases where a demand or offer has been entered but not yet settled |
| Negotiation Follow-Up | /SAReports.aspx?reportid=NegotiationFollowUp /NegotiationFollowUp | Reports | Report showing list of cases where a demand or offere has been entered but not yet settled |

| | | | |
|--|---|-------------------------------|--|
| Negotiation /Settlement | /Negotiation.aspx | General | Negotiation/Settlement page where demands, offers and settlements are entered |
| Negotiation /Settlement (Checks Panel) | /Negotiation.aspx#Checks | General | Checks received from Settlement |
| Negotiation /Settlement (Negotiations Panel) | /Negotiation.aspx#Negotiations | General | Settlement information |
| Negotiation /Settlement (Settlements Panel) | /Negotiation.aspx#Settlements | General | Negotiation/Settlement panel on the Negotiation/settlement page where demands, offers and settlements are entered |
| New Case Report | /SAReports.aspx?reportid=NewCaseReport /IntakePatternsReferralSource | Reports | Report of new cases entered for the period |
| New Cases | /Dashboard_Sol_V2_NewCaseLive.aspx | Dashboards | News cases from Probate/Dashboards Court |
| No Fault Report | /SAReports.aspx?reportid=No Fault Report/No Fault Report | SOL/Critical Deadline Reports | Report showing "No Fault" deadlines |
| Notes | /CaseNotesNew.aspx | General | Page where notes are entered the case |
| Notes | /CaseNotesNew.aspx?NoteType=Expert | Litigation | Litigation notes |
| Notes | /CaseNotesNew.aspx?NoteType=Court | Litigation | Litigation notes |
| Notes Overdue by Type | /DashboardStaffReview.aspx | Overdue Dashboards | Dashboard showing note types that have not been entered for the specified period |
| Notes Search | /NoteSearch.aspx | Tools | Tool that allows searching of notes system wide |
| Notes Search Report | /SAReports.aspx?reportid=NotesSearchReport /NotesSearchReport | Reports | Report of notes that have been entered |
| Notice of Claim Report | /SAReports.aspx?reportid=Notice of Claim/Notice of Claim Report | SOL/Critical Deadline Reports | Report showing "Notices of Claim" deadline |
| Notifications Setup | /NotificationsSetup.aspx | Admin | Set up for notification sent to staff based on certain occurrences |
| Office Calendar | /OfficeCalendar.aspx | Home | Main Office (Central) Calendar |
| Open Cases | /OpenCases.aspx | Dashboards | Dashboard showing list of open cases |
| Other | | Case | Other unrelated cases for the plaintiff |
| Other Cases | /OtherCases.aspx | Other | Other unrelated cases for the plaintiff |
| Other Providers | /Medical_Provider_OtherProvider.aspx | Plaintiff | Other medical providers (other than those entered for "current" treatment) |
| Outstanding Items | /Outstanding_Items.aspx | Other | Page showing list of items with "open" dated (e.g., open medical records request, Motion pending and no decision date, discovery with no satisfied date, etc.) |
| Overdue Dashboards | | Dashboards | Dashboard showing overdue items (client contact overdue, attorney file review overdue, supervisor file review) |
| Overdue Report | /SAReports.aspx?reportid=OverDueReport/OverDueReport | Staff Management Reports | Report showing overdue items (client contact overdue, attorney file review overdue, supervisor file review) |
| Overdue Status Summary | /SAReports.aspx?reportid=OverDueStatusSummary /OverDueStatusSummary | Staff Management Reports | Report showing list of cases where they have been in a status longer than the time designated |
| Overdue Tasks Report | /SAReports.aspx?reportid=OverDueTasksReport /OverDueTasksReport | Staff Management Reports | Report of tasks that are open with a past due date |
| Performance Dashboards | | Dashboards | Dashboard showing staff performance (cases assigned, etc.) |
| Photograph | /Case_Photo.aspx | General | Photographs page showing photographs that have been added to the case |
| Picklist Maintenance | /PickList.aspx | Admin | Admin section to configure certain items such as those shown in drop-down lists |
| Plaintiff | | Case | |
| Plaintiff Fact Sheet | /UDFs.aspx?UDFFor=PFS | Plaintiff | Page where a PFS can be designed/set for the case |
| Plaintiff UDFs | /UDFs.aspx?UDFFor=Plaintiff | Plaintiff | Page where User Defined Fields for the plaintiffs can be designed/set |
| Policy Limit Settlement Report | /SAReports.aspx?reportid=PolicyLimitSettlementReport /PolicyLimitSettlementReport | Financial Reports | Report showing settlements and the policy limits for the insurance entered in the case |
| Pre Unit Status | /DashboardSingleEventStatusReport.aspx | Performance Dashboards | Dashboard show staff performance which includes total settlements, fee generated, average times, etc. |

| | | | |
|-------------------------------------|--|----------------------|--|
| Pre-Litigation Stage | /Dashboard_Sol_V2_PreLitNew.aspx | Legacy Dashboards | |
| Pre-Litigation Stage | /StageDashboard.aspx?stage=1 | Stage Dashboards | Dashboard showing cases in the Pre-Litigation Stage |
| Prescriptions | /Prescriptions.aspx | Plaintiff | Page showing medications prescribed for the plaintiff |
| Presign - Signup Not Scheduled | /PresignNotScheduled.aspx | Dashboards | Dashboard showing leads where a sign-up kit has not been sent |
| Prior Claims | /Plaintiff_Prior_claims.aspx | Plaintiff | Priors claims made by this plaintiff |
| Problem Cases | /Dashboard_Sol_V2_ProblemCase.aspx | Dashboards | Dashboard showing cases where critical information is missing (missing incident date, missing incident facts, etc.) |
| Problem Cases Report | /SAReports.aspx?reportid=ProblemCasesReport /ProblemCasesReport | Reports | Report showing cases where critical information is missing (missing incident date, missing incident facts, etc.) |
| Project Details | /Project_Details.aspx | Home | Campaigns for mass tors, class action, etc., showing target plaintiff, potential intake issues, etc. A general guide for the Intake Team for special types of cases generally in the Mass tort arena |
| Query Tool (Alpha) | javascript:var w=window.open("http://saweb2008a/querytool/", "contacts", ""); | Tools | |
| Quick Injury | /QuickInjuryManagement.aspx | Admin | Admin section to designate quick injuries (check boxes to enter injuries) typically used in intake |
| QuickBooks Disbursements Report | /SAReports.aspx?reportid=QBDisbursements /QuickBooksDisbursements | Financial Reports | Report showing disbursements/Case Costs sent to QuickBooks |
| Recent Cases | | Home | List of last 20 cases accessed by the user |
| Recently Accessed Cases | /RecentlyAccessedCases.aspx | Recent Cases | List of cases recently accessed by the user |
| Refer-Out Rules | /ReferOutRules.aspx | Admin | Set up which case type are referred to designated attorney/law firms |
| Referrals By Clients | /SAReports.aspx?reportid=ReferralsByClients /ReferralsByClients | Reports | Report showing cases referred to the firm by former/current clients |
| Referred Out | /RetainerReferral_Out.aspx | General | Page showing referred out firm |
| Referred Out Firm Follow-up | /Dashboard_Sol_OutLawFirm.aspx | Dashboards | Dashboard that displays list of cases referred to firms/attorneys |
| Referred-Out Firm Performance | /SAReports.aspx?reportid=ReferredOutFirmPerformance /ReferredOutFirmPerformance | Reports | Report showing list of cases referred to to firms/attorneys |
| Reports | | Home | Access to Reports |
| Retainer Staff | /RetainerStaffManagement.aspx | Admin | Set up staff that are assigned when a matter is retained |
| Retainer/Referral | /Case_Retainer_Referral.aspx | General | Page where Retainer and Referral information is entered for the case |
| SA Pages | | Favorites | List of favorite filters |
| School/Other Activities | /Plaintiff_SchoolAndOtherActivity.aspx | Plaintiff | School and other activity information for the plaintiff |
| Settlement Dashboard | /DashboardSettlement.aspx | Financial Dashboards | Dashboard showing settlement information for the period selected |
| Settlement Forecast Report | /SAReports.aspx?reportid=SettlementForecastReport /SettlementForecastReport | Financial Reports | Report showing anticipated settlement for a designated period |
| Settlement Performance (Min. Value) | /SAReports.aspx?reportid=SettlementPerformanceMinValueReport /SettlementPerformanceMinValueReport | Financial Reports | Report showing forecasted settlements for the minimum settlement valu set. |
| Settlement Report | /SAReports.aspx?reportid=Settlement Report/Settlement Report | Financial Reports | Access to Financial Reports |
| Settlement/Fee Production | /Dashboard_SettlementProduction.aspx | Financial Dashboards | Dashboard showing settlements and firm/attorney fees generated from those settlements |
| Settlements By Case Group/Type | /SAReports.aspx?reportid=SettlementsByCaseGroupAndType /SettlementsByCaseGroupAndType | Financial Reports | Report showing settlements by Case Group |
| Shared Documents | /Case_SharedDocuments.aspx | General | Documents shared with "outside" sources/contacts |
| Sign Up Stage | /Dashboard_Sol_V2_Signups.aspx | Legacy Dashboards | Dashboard showing list of cases in the Sign Up Stage broken down by statuses in that stage |
| Sign Up Stage | /StageDashboard.aspx?stage=3 | Stage Dashboards | Dashboard showing cases in the Sing-Up Stage |
| SignUp Kit To Go Out | /Dashboard_SignUpKit.aspx | Dashboards | Dashboards showing cases in the specific status for "Sign-Up Kits" to be sent to the designated leads |
| | | | |

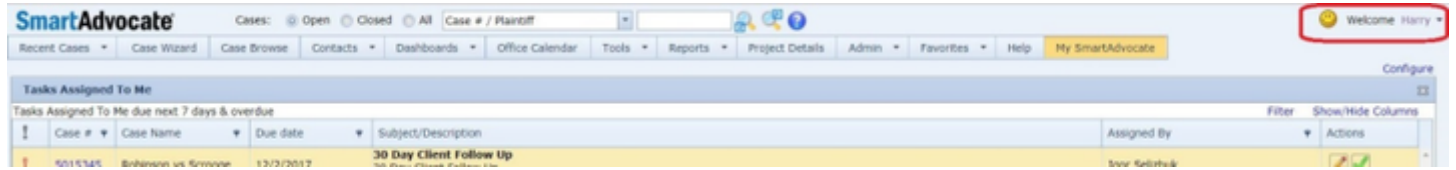
| | | | |
|--------------------------------|--|-------------------------------|---|
| Single Event Case Listing | /DashboardSingleEventCaseListing.aspx | Dashboards | Dashboard showing list of open "single event" type cases |
| Social Security Disability | /SocialSecurityDisability.aspx | General | Page for Social Security/Disability type matters |
| SOL Report | /SAReports.aspx?reportid=SOLReportv2/SOL Short Report V2 | SOL/Critical Deadline Reports | Report showing Statute of Limitations (SOL) deadlines |
| SOL/Critical Deadline Reports | | Reports | Report showing Statute of Limitations (SOL) deadlines |
| Special Damages | /PlaintiffSpecialDamage.aspx | Plaintiff | Page showing special damages for the plaintiff |
| Staff Activity Report | /SAReports.aspx?reportid=StaffActivity/StaffActivity | Staff Management Reports | Report showing staff activity over the designated period |
| Staff Management Reports | | Reports | Access to Staff Management Reports |
| Staff Performance | /DashboardStaffPerformance.aspx | Performance Dashboards | Dashboard showing staff activity over a designated period |
| Staff Performance Report | /SAReports.aspx?reportid=StaffPerformanceReport/StaffPerformanceReport | Staff Management Reports | Report showing staff activity over a designated period |
| Stage Dashboards | | Dashboards | Dashboard showing cases by Stages |
| Stage Overdue by Staff | /DashboardStageOverdue.aspx | Stage Dashboards | Dashboard showing cases in designated stages that are beyond the time frame set by the firm |
| Stages Setup | /StagesSetUp.aspx | Admin | Administrative function to set up the desired Stage for cases |
| Status Setup | /StatusSetUp.aspx | Admin | Administrative function to set up the desired Statuses for cases |
| Statute of Limitations | /Dashboard_Sol_V2.aspx | Dashboards | Dashboard showing the Statute of Limitations deadlines for cases |
| Suggestion | /Suggestion.aspx | Home | Send suggestions to SmartAdvocate |
| Suggestion Report | /SAReports.aspx?reportid=SuggestionReport/Suggestion Report | Reports | Report showing suggestions for SmartAdvocate |
| Summary | /CaseSummary.aspx | General | Access the case summary screen |
| Summary | /Case_Plaintiff.aspx | Plaintiff | Access the summary page for plaintiff |
| Summary | /Defendant.aspx | Defendant | Access the summary page for defendant |
| Summary | /Litigation_Index.aspx | Litigation | Access the summary page for litigation |
| Summary (Close Case) | /CaseSummary.aspx#CloseCase | General | Access the summary (close case) page |
| Summary (Staff Panel) | /CaseSummary.aspx#Staff | General | Access summary of staff assigned to the case to date |
| Summary (Status Panel) | /CaseSummary.aspx#Status | General | Access summary of different statuses assigned to the case over time |
| Summary (Value Panel) | /CaseSummary.aspx#Value | General | Access summary of case value |
| Supervisor File Review Overdue | /DashboardStaffReview.aspx?NoteTypeCriteria=80 | Overdue Dashboards | Dashboard showing Supervisor file review overdue |
| Surrogate | | Case | Surrogate (Probate Court) section |
| System Parameters | /AdminParams.aspx | Admin | Administrative functions to set certain parameters for SmartAdvocate |
| System Parameters (Internal) | /AdminInternalParams.aspx | Admin | Administrative functions to set certain parameters for SmartAdvocate |
| Task Groups | /TaskGroupManagement.aspx | Admin | Administrative function to set task groups |
| Task Templates | /TaskTemplateManagement.aspx | Admin | Administrative function to create task templates |
| Tasks | /Dashboard_Tasks.aspx | Dashboards | Dashboard to access tasks system wide |
| Tasks | /Case_Tasks.aspx | General | Page that shown tasks that have been assigned in the case |
| Template Editor | javascript:var w=window.open("Template_Editor.aspx","editor"); | Admin | Access the template editor page for admin |
| Template Page 1 | /CustomView.aspx?PageID=1&Template=true | Other | Access the template page 1 page for other |
| Template Page 2 | /CustomView.aspx?PageID=2&Template=true | Other | Access the template page 2 page for other |
| Template Page 3 | /CustomView.aspx?PageID=3&Template=true | Other | Access the template page 3 page for other |
| Template Page 4 | /CustomView.aspx?PageID=4&Template=true | Other | Access the template page 4 page for other |
| Template Page 5 | /CustomView.aspx?PageID=5&Template=true | Other | Access the template page 5 page for other |

| | | | |
|------------------------------|---|-------------------|---|
| Template Pages Configuration | /TemplatePagesConfig.aspx | Admin | Administrative function to create/set up custom pages |
| Template Panel 1 | /CustomView.aspx?PanelID=1&Template=true | Other | Custom Panel |
| Template Panel 2 | /CustomView.aspx?PanelID=2&Template=true | Other | Custom Panel |
| Template Panel 3 | /CustomView.aspx?PanelID=3&Template=true | Other | Custom Panel |
| Template Panel 4 | /CustomView.aspx?PanelID=4&Template=true | Other | Custom Panel |
| Text Message Templates | /TemplateEditForm.aspx | Admin | Administrative function to create/edit text message templates |
| Time Tracking | /Case_TimeTracking.aspx | Other | Time Tracking Page |
| Time Tracking Review | /TimeTrackingReview.aspx | Tools | Tools to review time tracking entries |
| Timeline | /CaseTimeline.aspx | General | General time line (audit trail) of certain activities in the case |
| Tip of the week | https://smartadvocate.atlassian.net/wiki/spaces/KB/pages/928382993/TipoftheWeek-MasterList | Help | Access the tip of the week page for help |
| Tip of the week Admin | /TipOfTheWeekAdmin.aspx | Help | Administrative function to add update Tip-Of-The-Week |
| Tools | | Home | Access to the Tools tab on the top tool bar |
| Top Search | /TopSearchResults.aspx | Top Search | Main search function for cases in SmartAdvocate |
| Treatment Report | /SAReports.aspx?reportid=TreatmentReport /TreatmentReport | Medical Reports | Report of medical treatment |
| Trial Prep | /Litigation_TrialPrep.aspx | Litigation | Page available under the Litigation Section to enter Trial Prep information |
| UDF Editor | /UDFManagement.aspx | Admin | Administrative function to create/edit/modify User Defined Fields |
| UDF Export | /UDF_Export.aspx | Tools | Tools to export User Defined Filed information |
| UDF Report | /SAReports.aspx?reportid=UDF Values Report /UDFCasesValues | Reports | Report of data entered in User Defined Fields |
| UDFs #1 | /UDFs.aspx?UDFFor=Other1 | Other | Custom Page for UDF |
| UDFs #2 | /UDFs.aspx?UDFFor=Other2 | Other | Custom Page for UDF |
| UDFs #3 | /UDFs.aspx?UDFFor=Other3 | Other | Custom Page for UDF |
| UDFs #4 | /UDFs.aspx?UDFFor=Other4 | Other | Custom Page for UDF |
| UDFs #5 | /UDFs.aspx?UDFFor=Other5 | Other | Custom Page for UDF |
| Unassigned Documents | /Document_Scanning.aspx?un_mode=1 | Tools | Tools to list documents that have not be assigned to a case |
| Upside Down Medicals Report | /SAReports.aspx?reportid=UpsideDownMedicalsReport /UpsideDownMedicalsReport | Financial Reports | Report of medical bills that exceeds insurance policy limits |
| User Manual | http://app.smartadvocate.com/Help/SmartAdvocate_User_Manual_07_2019.pdf | Help | User Manual |
| User Permission Groups | /PagesInRoles.aspx | Admin | Administrative access to User Permission Groups |
| User Preferences | /UserPreference.aspx | Admin | Administrative access to set user preferences |
| Users | /UserMaintenance.aspx | Admin | Administrative access to configure users |
| VA Claims | /VeteransAffairsClaims.aspx | Litigation | Page for VA claims under the Litigation section |
| Vehicles | /Vehicle.aspx?plaintiff=true | Plaintiff | Vehicle information for plaintiff |
| Vehicles | /Vehicle.aspx | Defendant | vehicle information for defendant |
| Verdict | /Verdict.aspx | Litigation | Verdict page under litigation section |
| ViewStat Report | /SAReports.aspx?reportid=ViewStat/Quick Status Rpt | Reports | A quick status report showing specific information for the specified case (incident detail, assigned staff, critical deadlines) |
| Web Importer | /Web_Intake.aspx | Tools | (Future planned feature) |
| Who is where tomorrow | /SAReports.aspx?reportid=WhosWhere/WhosWhereUpdated | Calendar Reports | Access the who is where tomorrow page for calendar reports |
| Will Information | /Surrogate_WillInformation.aspx | Surrogate | Page where wills are entered the case |
| WorkPlan Assignments | /WorkPlanAssignment.aspx | Work Plans | SmartAdvocate WorkPlans (Create, modify, assign) |
| WorkPlan Edit | /WorkPlanEdit.aspx | | Edit existing WorkPlans |
| WorkPlan Management | /WorkPlanAdmin.aspx | Work Plans | SmartAdvocate WorkPlans (Create, modify, assign) |
| WorkPlans | /WorkPlans.aspx | General | Access the workplans page in the case to assign WorkPlan to |

| | | | |
|--------------------|---------------------|------------|--|
| | | | the Case, edit the WorkPlan items, etc. |
| WorkPlans | | Admin | Administrative access to WorkPlan Management |
| WorkPlans in Cases | /WorkPlanCases.aspx | Work Plans | List of WorkPlans that are assigned to cases |

Logout of SmartAdvocate®

Click on the "Welcome [your name]" at the top right corner of any screen in SmartAdvocate.



A dropdown menu appears:



Click "Logout." You will be logged out of SmartAdvocate and brought to the Login screen, even if you previously checked the "Remember me" button when you logged in.

Change Password

This page is under construction. Check back soon for updates!

Recent Cases

A way to easily search for and access cases is the Recent Cases tab displayed on the far left of the top toolbar. This dropdown will display a list of the last 20 cases you have visited. At the bottom of this dropdown, there is a link to view All Recently Accessed Cases. This will bring you to a page that can display up to 200 of your last visited cases, in a similar format to your search results page, with columns showing different pieces of information such as Case Number, Plaintiff Name and the date and time the case was last accessed.

Overview

The SmartAdvocate system maintains a list of the last twenty cases summaries you have viewed. That list is available as a dropdown menu under Recent Cases, the leftmost item in the Top Tool Bar. To view it, hover your cursor over the Recent Cases heading. This list can help by providing a shortcut to view cases that you access frequently or that have become especially important recently. For each case in the list, the case's number and name will be shown, separated by a hyphen. Clicking any case in the list will take you to that particular Case Summary. If you are currently viewing the Case Summary of a case that is on the list, then that case will be highlighted in orange on the list.



The very last item in the list, after all twenty cases, is "Other Recently Accessed Cases." Clicking this will take you to the [Recently Accessed Cases](#) screen. If you are already at the Recently Accessed Cases screen, this item will be highlighted in orange on the list.

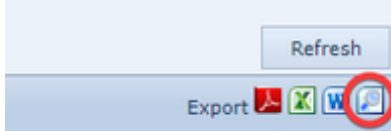
Other Recently Accessed Cases

The Recently Accessed Cases screen provides an overview of the case summaries you have accessed most recently, in the form of a table. The table has three columns of information: the number of the case, the name of the case, and the date and time at which the Case Summary was last accessed. Clicking the case number opens the Case Summary screen for that case in a new tab. The table also has a fourth column which contains a right-click icon; clicking this icon brings up a list of possible actions that can be taken for its respective case. Right-clicking anywhere in a given case's row brings up the same list of actions for that case. The Recently Accessed Cases screen also includes a number of other tools that interact with the table of results.

To the upper left of the table is an input field that, by default, contains the number "100," surrounded by text in the form "Show last [____] Cases." This field allows you to select how many cases you wish this screen to list. If you wish to change the number, fill in the field with whatever number you prefer, and then click the "Refresh" button found to the upper right of the table, on the same line as the input field. Whatever number you choose will persist on your computer even if you leave this screen or log out. (You can always return it to the default by entering "100" in the field and clicking "Refresh" again.)

| Case Number | Case Name | Access Date Time |
|-------------|-------------------------------------|-----------------------|
| 150253 | McCoy & McCoy | 12/15/2017 1:24:00 PM |
| 170062 | Kilbre & Kim | 12/13/2017 1:49:00 PM |
| 4000214 | Law Offices of Herbert S. Ellis, PC | 12/13/2017 1:45:00 PM |
| 170063 | Benton & Budd, P.C. | 12/13/2017 1:41:00 PM |
| 170485 | Nelson & Mullins | 12/11/2017 9:10:00 AM |
| 170829 | The Miller Firm, LLC | 12/11/2017 9:08:00 AM |
| 580539 | Grappier Law Group, PLLC | 12/11/2017 9:00:00 AM |
| 170436 | Coplin & Crane, LLP | 12/6/2017 9:48:00 AM |
| 170902 | Maxwell Law Group | 12/6/2017 12:14:00 PM |
| 4000208 | Paris & Chalkin, PLLC | 12/6/2017 7:40:00 AM |

In addition to the usual list of export options for the table, there is an icon with a magnifying glass. Clicking this icon opens the list of all the cases in the table in a new tab as a Case Browse [Search Results](#) table.



Case Browse

Case Browse is a powerful search tool, offering a wide range of filters that can be combined in various ways to perform highly customizable searches of your case inventory. The filters can also be saved to allow you to easily repeat favorite searches. The searches return an extensive set of data about the cases they find, making it possible to get a broad sense of the status of various cases, or to compare them, at a glance. To access the Case Browse tool, click the "Case Browse" button in the Top Tool Bar.

Here are some additional topics for Case Browse:

[Case Browse Search Criteria](#)

[Case Browse Search Results](#)

[Save and Add New Filter to Favorites](#)

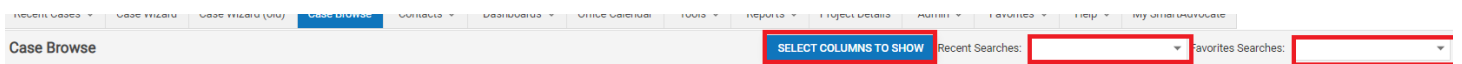
[Use Case Browse and Mass Update to Display Phone Number, SSN, DOB, etc. in Your Report](#)

[Use Case Browse and Predefined Templates to Send Mass Communications to Clients](#)

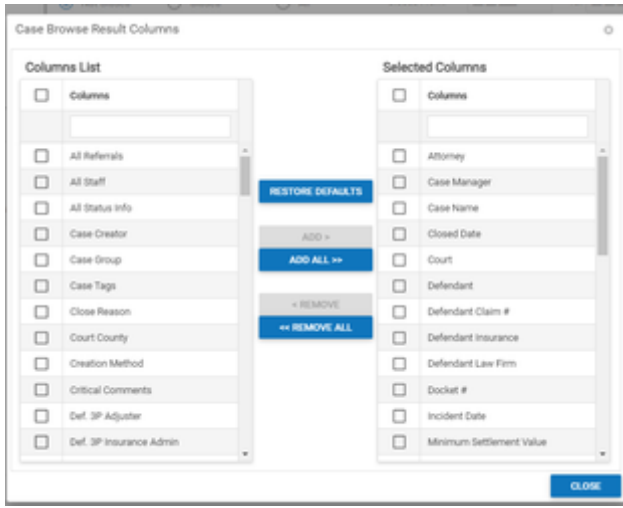
Search Criteria

Selecting the Available Result Columns

In the Case Browse title bar, there is a button labeled "Select Columns to Show," a dropdown labeled "Recent Searches:", and a dropdown labeled "Favorites Searches:".

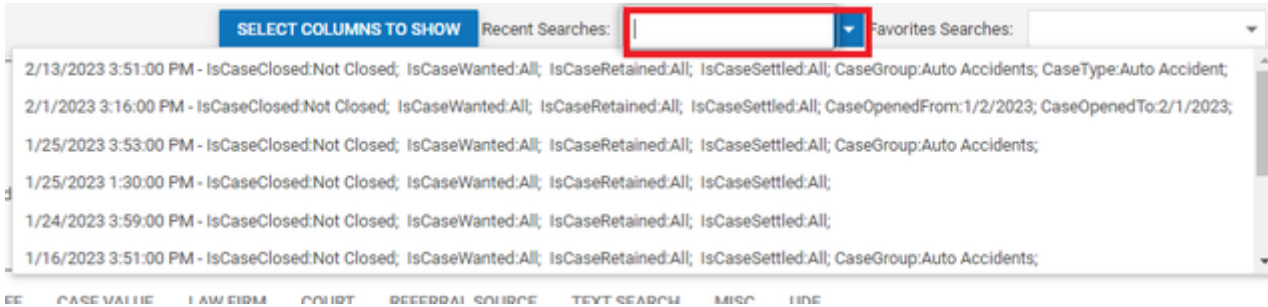


Clicking "Select Columns to Show" brings up a panel with two lists of items with checkboxes. The list on the left is titled "Columns List," and the list on the right is titled "Selected Columns." The items in "Columns List" are the columns that are currently excluded from the Case Browse search results, and the items in "Selected Columns" are the columns that are currently included in the search results. Columns excluded from the search results will not be shown in the Column Chooser as hidden; they will be completely unavailable. Note: if you perform a search with zero items in "Selected Columns," the search will instead include all possible columns. To move items from one list to the other, click the checkboxes of each of the items you wish to move, then click either the "Add >" (if you are moving items from "Columns List" to "Selected Columns") or "< Remove" (if you are moving items from "Selected Columns" to "Columns List"). Note: be careful to only click on the checkboxes of the items and not elsewhere on the item; otherwise, it will deselected the other items you have already selected. To move all of the items from one list to the other simultaneously, click either the "Add All >>" (if you are moving all the items from "Columns List" to "Selected Columns") or "<< Remove All" (if you are moving all the items from "Selected Columns" to "Columns List") button. When you are finished making changes, click either the "Close" button or the white X in the upper right corner.

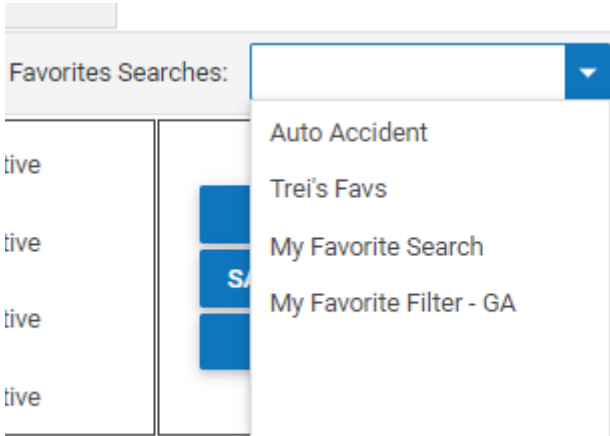


Repeating Previous Searches

The "Recent" dropdown includes the dates and times of the last ten Case Browse searches you performed. Choosing one will automatically fill in all of the Case Browse fields with the options that were used when the chosen search was made. (This will also use the same "Select Columns to Show" settings as when you made the chosen search.) You may make any changes you wish before you actually perform the search.



The "Favorites" dropdown includes the name of every Case Browse filter you have saved to your favorites. (See [Save and Add New Filter To Favorites.](#)) Choosing one will automatically fill in all of the Case Browse fields with the options that were used in the chosen filter. (This will also use the same "Select Columns to Show" settings as were selected when you saved the chosen filter.) You may make any changes you wish before you actually perform the search.



Date Range Filters, Searching, and Saving Filters

| | | | |
|--|--|---|--|
| Open From: <input type="text"/> To: <input type="text"/> <input type="checkbox"/> Relative | <input checked="" type="radio"/> Not Closed <input type="radio"/> Closed <input type="radio"/> All <input type="radio"/> Not Wanted <input type="radio"/> Wanted <input checked="" type="radio"/> All <input type="radio"/> Not Retained <input type="radio"/> Retained <input checked="" type="radio"/> All <input type="radio"/> Not Settled <input type="radio"/> Settled <input checked="" type="radio"/> All | Closed From: <input type="text"/> To: <input type="text"/> <input type="checkbox"/> Relative Wanted From: <input type="text"/> To: <input type="text"/> <input type="checkbox"/> Relative Retained From: <input type="text"/> To: <input type="text"/> <input type="checkbox"/> Relative Settled From: <input type="text"/> To: <input type="text"/> <input type="checkbox"/> Relative | <input type="button" value="SEARCH CASES"/> <input type="button" value="SAVE FILTER TO FAVORITES"/> <input type="button" value="CLEAR ALL FILTERS"/> |
|--|--|---|--|

Below the Case Browse title bar are three areas. The leftmost one allows you to filter the results by when the case was opened, and which office is handling the case (if you have multiple offices). It contains a pair of fields labeled "Open From:" and "To:", a checkbox labeled "Relative," and a dropdown labeled "Office Location:". If the "Relative" checkbox is selected, the "Open From" and "To" fields are text fields that each have the text "days

ago" following them. Enter 0 (zero) in the first "days ago" box to begin your search from the current date. If the checkbox is not selected (which is the default), the fields are date-widget dropdowns. The "Office Location" dropdown includes a blank choice, the choice "All," and a choice for each of your offices.

The center area allows you to filter the results by when and whether the case was closed, retained, and/or settled. It contains three similar lines. The first line includes three radio buttons labeled, respectively, "Not Closed," "Closed," and "All," a pair of fields labeled "Closed From:" and "To:", and a checkbox labeled "Relative." The second and third lines are identical to the first, except with "Retained" and "Settled," respectively, in place of each instance of "Closed." (There is one other difference: in the first line, "Not Closed" is the default, but in the other two, "All" is the default.) The radio buttons allow you to filter by whether the case has been closed/retained/settled (select "All" to not filter by this question). The other two fields and checkbox operate in the same way as the "Open From:" and "To:" fields described above (except that they filter by the date of closure/retention/settlement instead).

The rightmost area contains three buttons, labeled, from top to bottom, "Search Cases," "Save Filter to Favorites," and "Clear Filters." Clicking "Search Cases" will perform the search using the selected filters, opening a new tab with the search results in them. (See [Search Results](#) for details about this screen.) Clicking "Save Filter to Favorites" brings up a small panel consisting of a checkbox marked "Default," two radio buttons marked "Fill" and "Fill & Execute" (which are greyed out if "Default" is not checked), an input field marked "Filter Name," and a button marked "Save Filter." This panel allows you to keep the filter in your Favorites (see [Favorites](#) for details). To keep the filter in Favorites, simply fill in a name for the filter and click "Save Filter." If you wish to have the filter be the default, and automatically fill itself in whenever you open the Case Browse screen, click the Default checkbox. You can additionally have the search be performed whenever you open Case Browse by selecting "Fill & Execute." Clicking "Clear All Filters" will return all the fields and options in Case Browse to their defaults, undoing any changes. (The exception is the "Select Columns to Show" panel; all the columns will be moved to the "Column List" side, regardless of the default settings.)

The Criteria Tabs

General Tab Structure and Function

Almost every tab in Case Browse has two buttons labeled "Select Visible" and "Unselect Visible," and a checkbox labeled "Exclude." The tabs that are exceptions are as follows: Text Search, Misc, and UDF have neither the buttons nor the checkbox; Referral Status does not have the checkbox; and Case Group's buttons are instead labeled "Select All Visible" and "Unselect All Visible" (though these do the exact same thing as the respective buttons in the other tabs). Clicking "Select Visible" in any tab will select every item on the *current page* of that tab; the items on other pages are not affected. If you wish to additionally select all the items on a different page, you will have to navigate to that page and then click "Select Visible" again. Similarly, clicking "Unselect Visible" in any tab will deselect every item on the current page of that tab. If you select the "Exclude" checkbox and at least one item in the same tab, then when the search is performed, the results will include only those that do *not* match any of the items selected in that tab.

Several tabs also have two radio buttons labeled "Start With" and "Contains," an input field, and a partitioned bar containing each letter of the alphabet separately. This collection of elements allows you to narrow down the list of items in their respective tab to make it easier to find the ones you wish to select. There are two ways to use this tool: either fill in the input field with text that either starts, or is contained in, the text of the item you wish to find, then select the appropriate radio button; or simply click one of the letters of the alphabet, which will automatically fill the input field with that letter and select the "Start With" button, thus displaying only those items beginning with the chosen letter. Note: this tool does not affect the search itself. It is only provided to make it easier to navigate among the items in a given tab. You may freely use it to find an item, select that item, then use it again to find another item to select; even though the first item may no longer be visible, it is still considered to be selected. The list of tabs that do not provide this tool is as follows: Referral Status, Text Source, Misc., and UDF.

Tabs with no items selected are treated as including all possible items in that tab; i.e., no filtering based on that category occurs.

Case Group

The Case Group tab allows you to choose which case groups you wish to appear in the search results. It also includes two additional checkboxes, above the list of case groups: one labeled "Mass Tort" and one labeled "Non Mass Tort." Selecting "Mass Tort" will include all case types defined as being mass torts (see Case Types). Selecting "Non Mass Tort" will include all case types defined as not being mass torts. These checkboxes are not affected by the "Exclude" checkbox; however, you may use the "Exclude" checkbox in conjunction with the "Mass Tort" or "Non Mass Tort" checkboxes, if you also select one or more case groups. For example, selecting the "Mass Tort," "Exclude," and "Defective Pharmaceuticals" checkboxes will result in a search that includes all mass tort case types *except* those in the Defective Pharmaceuticals group. If you select any of the items in the Case Group tab, it will automatically narrow the list of available items in the Case Type and Case SubType tabs to only offer those that are members of at least one of the selected case groups. Note: this is true even if "Exclude" is also selected; i.e. the Case Type tab will only display those case types that are members of the groups you are already excluding. Therefore, if you wish to do any further filtering on case types or subtypes, it is not generally recommended to use the "Exclude" button in Case Group.

| CASE GROUP | CASE TYPE | CASE SUBTYPE | STATE | STATUS | SUB-STATUS | REFERRAL STATUS | STAFF | CASE VALUE | LAW FIRM | COURT | REFERRAL SOURCE | TEXT SEARCH | MISC | UDF | | | | | | | | | | | | | | | | | | | | | |
|---|--|--|---|-------------------------------------|--------------------------------|---------------------------------------|--|---|---|--|--|--|--|--|--|-------------------------------------|-------------------------------------|---|--|---|--------------------------------------|--|-----------------------------------|--|--------------------------------------|--|---|---|--|--------------------------------------|--|------------------------------|--------------------------------------|---|--|
| <input type="button" value="SELECT ALL VISIBLE"/> <input type="button" value="UNSELECT ALL VISIBLE"/> | | <input type="checkbox"/> Mass Tort <input type="checkbox"/> Non Mass Tort <input type="checkbox"/> Exclude | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Admin Cases | <input type="checkbox"/> Airplane Accident | <input type="checkbox"/> Auto Accident (X) | <input type="checkbox"/> Auto Accidents | <input type="checkbox"/> Bankruptcy | <input type="checkbox"/> Basic | <input type="checkbox"/> Civil Rights | <input type="checkbox"/> Class Actions | <input type="checkbox"/> Construction Accidents | <input type="checkbox"/> CRS - Auto Accidents | <input type="checkbox"/> CRS - Defective Pharmaceuticals | <input type="checkbox"/> CRS - Employees | <input type="checkbox"/> CRS - Funding Company | <input type="checkbox"/> CRS - Product Liability | <input type="checkbox"/> Defective Medical Devices | <input type="checkbox"/> Defective Pharmaceuticals | <input type="checkbox"/> Employment | <input type="checkbox"/> Family Law | <input type="checkbox"/> General Practice | <input type="checkbox"/> Government Benefits | <input type="checkbox"/> Hurricane Damage | <input type="checkbox"/> Immigration | <input type="checkbox"/> Insurance Defense | <input type="checkbox"/> Maritime | <input type="checkbox"/> Medical Malpractice | <input type="checkbox"/> MedMal Test | <input type="checkbox"/> MND - Auto Accident | <input type="checkbox"/> Non Litigation | <input type="checkbox"/> Premises Liability | <input type="checkbox"/> Product Liability | <input type="checkbox"/> Real Estate | <input type="checkbox"/> Social Security | <input type="checkbox"/> SSD | <input type="checkbox"/> Toxic Torts | <input type="checkbox"/> Workers Compensation | <input type="checkbox"/> X Stock Fraud |

Case Type

The Case Type tab allows you to choose which case types you wish to appear in the search results. It has no unique additional checkboxes or buttons. If you select any of the items in the Case Type tab, it will automatically narrow the list of available items in the Case SubType tab to only offer those that are members of at least one of the selected case types. Note: this is true even if "Exclude" is also selected; i.e. the Case SubType tab will only display those case types that are members of the groups you are already excluding. Therefore, if you wish to do any further filtering on subtypes, it is not generally recommended to use the "Exclude" button in Case Type. The entries in the UDF tab, if any, are dependent on what is selected in this tab.

Unless exactly one case type is selected, the UDF tab will be blank; if exactly one case type is selected, the UDF tab will be automatically populated by the UDFs associated with that case type.

Case SubType

The Case SubType tab allows you to choose which case subtypes you wish to permit to appear in the search results. It has no unique additional checkboxes or buttons.

State

The State tab allows you to limit which cases you wish to appear by which state (or territory, or Canadian province) they take place in. It has no unique additional checkboxes or buttons.

Status

The Status tab allows you to limit which cases you wish to appear by their current status. The list of statuses in this tab also includes all the possible stages. The stages are in bold, with the statuses contained in each stage listed below their respective stage. Selecting any stage will automatically select every status contained in that stage. Deselecting any stage will automatically deselect every status contained in that stage. The stages themselves are not actually included in the search filter; they are only provided as a means to efficiently select or deselect all of the statuses they contain. You can, if you wish, select a stage (thereby selecting every status it contains) then individually deselect some of the statuses that were automatically selected. Although the stage will technically remain selected, the statuses you have deselected will be excluded from the search results. If there are many possible statuses defined in your system, there may be a scroll bar within this tab (separate from the scroll bar for Case Browse itself, if there is one) that you can use to view the statuses that are not initially visible.

In the upper right corner, you can choose how many days a case must have been in a status in order to be returned by your search. Enter the number of days, and then choose one of the following restrictors from the dropdown: "exactly", "more than", "fewer than", "at least", or "at most".

Sub-Status

The Sub-Status tab allows you to limit which cases you wish to appear by their non-primary status. On the far right of the screen, just above the list of items, is a dropdown selector containing all the status types other than the main one, Status. By default, this will be set to Sub Status. Whichever status type is selected, the list of items will change to only include all possible instances of that status type. You may select from this list as in any other tab. You may also select items that are instances of a certain status type, then select another status type and select items that are that type. Note, however, that whereas selecting multiple items from the same status type will yield results that have at least one of those statuses, selecting items from different

status types will treat the different status types as if they were different tabs; i.e. it will only yield results that, *for every chosen status type*, contain at least one of the items selected in that type.

Referral Status

The Referral Status tab allows you to limit which cases you wish to appear by the types of referrals or substitutions that have occurred in the case. These referrals and substitutions are entered in the [Retainer/Referral](#) case page. Note: the "Only Partial Sub-Out" and "Only Partial Out" options match cases that have Referral Out or Sub Out records with only an individual plaintiff, instead of "All," in the Plaintiff Name column.

Staff

The Staff tab allows you to limit which cases you wish to appear by the firm staff member involved in them. There are two dropdown selectors above the list of staff members. The first is labeled "Show Only (Firm Role):" and the second is labeled "Search Only for Case Role:". Both dropdowns offer a list of checkboxes; in both, you may select any number of the checkboxes before closing the dropdown. If you select any of the options in the "Firm Role" dropdown, the list of staff members will be narrowed down to only those who have one of the roles you selected. This dropdown does not affect the actual search results; it is provided to help you find the staff members you wish to select for the search itself. If you wish for the search itself to only include staff members who have one of the roles you selected, you can simply select all of the staff members who remain in the list after you have made your selections in the dropdown. If you select any of the options in the "Case Role" dropdown and any of the staff members in the list, then the search will only yield results that include at least one of the selected staff members in at least one of the selected roles. Remember that the "Firm Role" dropdown narrows down the available staff members but *does not* actually affect the search, whereas the "Case Role" dropdown does not affect the list of available staff members but *does* affect the search.

Case Value

The Case Value tab allows you to limit which cases you wish to appear by the estimated value assigned to the case. It has no unique additional checkboxes or buttons.

Law Firm

The Law Firm tab allows you to limit which cases you wish to appear by the law firm involved in them. It has no unique additional checkboxes or buttons. If a law firm is selected in this tab, any case involving that firm in any law-firm-type capacity (Defendant Law Firm, Referred Out Law Firm, Referral Law Firm, or Plaintiff Law Firm) will be included in the results.

Court

The Court tab allows you to limit which cases appear by the court associated with them. It has no unique additional checkboxes or buttons.

Referral Source

The Referral Source tab allows you to limit which cases you wish to appear by the source of their referral. There are five radio buttons above the "Select Visible" and "Unselect Visible" buttons; from left to right, they are labeled "Advertising Source," "Referral Law Firm," "Referral Attorney," "Other Referral," and "Any Referral." By default, "Advertising Source" is selected. Selecting any of the buttons will change the list of referrers to only include those who fit the selected role in at least one referral. The list shown when "Any Referral" is selected contains all the referrers in the other four lists. If you select at least one referrer in one of the lists, then select one of the other radio buttons (so that the referrers you selected are no longer in the currently visible list), the referrer(s) you selected will still be used to filter the search. If, however, you then select one of the newly visible referrers, the ones you had

previously selected will be automatically deselected. In other words, if a selected referrer is not visible in the current list, then selecting any visible referrer will deselect all non-visible referrers.

Text Search

The Text Search tab allows you to limit which cases you wish to appear by whether particular text has been entered into various [Text input](#) fields (particularly comment fields). To use this tab, enter the text you wish to search for in the field at the top of the tab, and select the checkboxes associated with the locations in the case files to include in the search. You may search for multiple words or phrases if you wish. To search for a complete phrase, enclose it in quotes. (Typing "Broken leg" will find cases with text containing the complete phrase "broken leg" as written, though ignoring capitalization.) To search for multiple words or phrases that must all be present, type the word AND (the capitalization is necessary) between the words or phrases. (Typing "this AND that" will find cases with text containing both the words "this" and "that" somewhere.) To search for multiple words or phrases, returning any record where at least one of those words or phrases is present, type the word OR (the capitalization is necessary) between the words or phrases. (Typing "this OR that" will find cases with text containing at least one of the words "this" or "that" somewhere.) You may use parentheses to enclose parts of the search text, to perform complicated Boolean searches. (Typing "(this AND that) OR "the other thing" will find cases with text containing either the complete phrase "the other thing" or both the words "this" and "that" somewhere. Generally, this level of complexity is not necessary, but it is available just in case.)

Misc

The Misc tab includes various options for limiting which cases you wish to appear. Among the options: searching for cases where a product's ID or use has or has not been confirmed (which is determined in the [Incident](#) page for certain case groups), whether a case is marked as the master case for a MDL, whether a plaintiff in the case is deceased, whether a case is marked as including a "serious injury," whether a defendant in the case is a corporate or municipal entity, the location of a plaintiff or medical provider, the date of birth or death of a plaintiff, or a simple list of case numbers to include in the search.

UDF

The UDF (User Defined Fields) tab allows you to limit which cases appear in the results by the answers to user-defined questions. There are always seven radio buttons at the top of this tab; from left to right, they are labeled "Incident," "Case," "Plaintiff," "Defendant," "Court," "Expert" and "PFS" (Plaintiff Fact Sheet). Unless exactly one case type has already been selected (see the Case Type tab, above), there will be nothing listed below these buttons, regardless of which button is selected. If exactly one case type has been selected under the Case Type tab, then selecting any of these buttons will display the user-defined questions that are listed in the corresponding UDF screen for the given case type. Each of these questions will be followed by its respective inputs (e.g. a text field, a set of checkbox options, etc.), and there will also be an additional checkbox marked "Unanswered" after the set of inputs. If you select or fill in the input for a question, the search results will only include cases where the answer to that question matches your input. If you check the "Unanswered" box for a question, the search results will only include cases where that question was left unanswered. Note: if the input for a question is a text field, the search results will include cases where the answer to that question *contains* your input.

Incident
 Case
 Plaintiff
 Defendant
 Court
 Expert
 PFS

Location

Unanswered

Address1

Unanswered

Address2

Unanswered

City

Unanswered

County

Case Browse Search Results

General Structure and Table Columns

When you search for a matter using Case Browse, the search results will be served to you in the form of a table where each row contains the information from an individual result. The information is separated into a series of columns, each of which relates to a particular category of information. If there are more rows in the current page of the table than your screen can show, you can use the scroll bar on the right (or whatever means of scrolling through a website you prefer) to scroll through the results. If there are more columns in the table than your screen can show, you can use the horizontal scroll bar immediately below the visible portion of the table (and just above the pagination tool) to scroll through the columns. The available columns, in alphabetical order, are:

- All Staff: All firm staff members who are assigned to the case in any capacity.
- Attorney: The firm's primary attorney for the case.
- Case Manager: The firm's case manager for the case.
- Case Name: The name of the case.
- Case No: The number of the case in the SmartAdvocate system. Clicking the number will open the case summary for that case number in a new tab. (Note: Case No. is the only column that cannot be removed from the Case Browse results table using the Select Columns To Show button.)
- Closed Date: The date the case was closed.
- Court: The court handling the case.
- Def. 3P Adjuster: The third party adjuster for the primary insurance company covering the primary defendant.
- Def. 3P Insurance Admin: The third party insurance administrator for the primary insurance company covering the primary defendant.
- Def. Ins. Limit (High): The upper limit of the primary defendant's insurance coverage.
- Def. Ins. Limit (Low): The lower limit of the primary defendant's insurance coverage.
- Defendant Address: The street address of the primary defendant.
- Defendant Adjuster: The name of the adjuster for the primary insurance company covering the primary defendant.
- Defendant City: The city in which the primary defendant is located or resides.
- Defendant Claim #: The claim number for the primary defendant's primary insurance.
- Defendant Insurance: The name of the insurance company providing primary insurance to the primary defendant.
- Defendant Law Firm: The law firm representing the primary defendant.
- Defendant State: The state in which the primary defendant is located or resides.
- Defendant Zip Code: The ZIP code for the address where the primary defendant is located or resides.
- Defendant: The name of the *primary* defendant.
- Docket #: The docket number of the case.
- Incident Date: The date of the incident.
- Incident Facts: The facts underlying the case, as entered in the Incident tab of Case Wizard or on the Case Incident page.
- Last Note (by Date): The most recent note on the case. Also includes the date, time, and creator of the note before the text of the note. This information in this column is *based upon the date inputted on the note* by the creator of the note, regardless of date the note was actually created.
- Last Note: The most recent note on the case. Also includes the date, time, and creator of the note before the text of the note. This information in this column is based upon *the date on which the note was created*, regardless of the date inputted on the note by the user who created the note.
- M1 - Case Rank Comment: Any comments about the M1 sub-status. (See M1 – Case Rank.)
- M1 - Case Rank Date: The date on which the M1 status was entered in the case. (See M1 – Case Rank.)
- M1 - Case Rank Days: The number of days the case has been in the M1 sub-status. (See M1 – Case Rank.)
- M1 – Case Rank: An additional sub-status. As initially set up, this sub-status is intended to represent the case's Case Rank (however that term may be defined by your firm). The M1 status is configurable by the firm Administrator to represent any sub-status chosen by your firm and be named accordingly. The exact heading and meaning of this column will depend on how your status types have been configured. If the firm Administrator has edited the name of this status, the edited name will appear as a column heading.
- M2 - Treatment Comment: Any comments about the M1 sub-status. (See M2 – Case Rank.)
- M2 - Treatment Date: The date on which the M1 status was entered in the case. (See M2 – Case Rank.)
- M2 - Treatment Days: The number of days the case has been in the M1 sub-status. (See M2 – Case Rank.)
- M2 – Treatment: An additional sub-status. As initially set up, this sub-status is intended to represent the status of the plaintiff's treatment. The M2 status is configurable by the firm Administrator to represent any sub-status chosen by your firm and be named accordingly. The exact heading and meaning of this column will depend on how your status types have been configured. If the firm Administrator has edited the name of this status, the edited name will appear as a column heading.
- M3 - Negotiation Comment: Any comments about the M3 sub-status. (See M3 – Case Rank.)
- M3 - Negotiation Date: The date on which the M3 status was entered in the case. (See M3 – Case Rank.)
- M3 - Negotiation Days: The number of days the case has been in the M3 sub-status. (See M3 – Case Rank.)
- M3 – Negotiation: An additional sub-status. As initially set up, this sub-status is intended to represent the status of any settlement negotiations in the case. The M3 status is configurable by the firm Administrator to represent any sub-status chosen by your firm and be named accordingly. The exact


heading and meaning of this column will depend on how your status types have been configured. If the firm Administrator has edited the name of this status, the edited name will appear as a column heading.

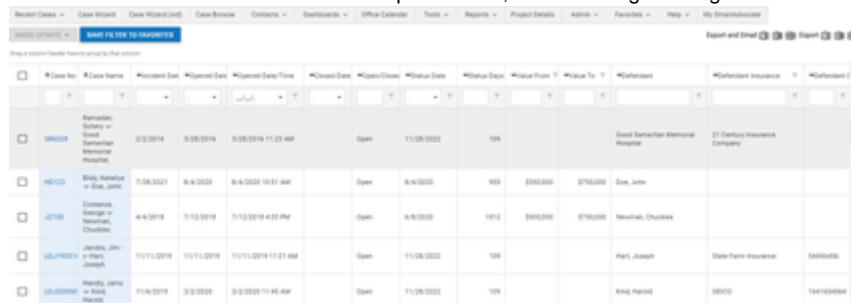
- Minimum Settlement Value: The minimum settlement value set for the case.
- Next Deadline/SOL: The next open Critical Deadline or Statute of Limitations in the case.
- Office: The firm office that is handling the case. This column is unrelated to the state in which the case is being litigated.
- Open/Closed: Whether the case is open or closed.
- Opened Date/Time: The date and time the case was opened.
- Opened Date: The date the case was opened.
- Other Referral: The referral source, not otherwise classifiable, that referred the case to your firm.
- Paid Advertising: The paid advertising source that provided the case lead.
- Paralegal: The paralegal for the case.
- Pl. 3P Adjuster: The third party adjuster for the primary insurance company covering the primary plaintiff.
- Pl. 3P Insurance Admin: The third party insurance administrator for the primary insurance company covering the primary plaintiff.
- Pl. Ins. Limit (High): The upper limit of the primary plaintiff's insurance coverage.
- Pl. Ins. Limit (Low): The lower limit of the primary plaintiff's insurance coverage.
- Plaintiff Adjuster: The name of the adjuster for the primary insurance company covering the primary plaintiff.
- Plaintiff Claim #: The claim number for the primary plaintiff's primary insurance.
- Plaintiff Insurance: The name of the insurance company providing primary insurance to the primary plaintiff.
- Plaintiff Law Firm: The law firm (other than yours) representing the plaintiff.
- Plaintiff: The name of the *primary* plaintiff.
- Referral Attorney: The attorney who referred the case to your firm.
- Referral Law Firm: The law firm that referred the case to your firm.
- Referral Source: The main referral source of the case. If the case has multiple referral sources, the one listed in this column is chosen in the following way: Attorney has highest priority, then Paid Advertising, then Other.
- Referred Out Attorney: The attorney to whom the case was referred by your firm.
- Referred Out Law Firm: The law firm to which the case was referred by your firm.
- Retained Date: The date on which the case was retained.
- Stage: The stage the case is currently in.
- State: The state in which the case is being litigated. This column is unrelated to the state in which the office handling the case is located.
- Status Comment: The comment on the current status.
- Status Date: The most recent date on which the status of the case was changed.
- Status Days: The number of days since the most recent date on which the status of the case was changed.
- Status: The current status of the case.
- Sub Out Attorney: The attorney who has been substituted into the case and taken over the case from your firm.
- Sub Out Law Firm: The law firm that has been substituted into the case and taken over the case from your firm.
- Sub Status Comment: Any comment about the case's sub-status.
- Sub Status Date: The most recent date on which the status of the case was changed.
- Sub Status Days: The number of days the case has been in a particular sub-status.
- Sub Status: The current sub status of the case.
- Sub Type: The case subtype.
- Total Liability Coverage: The sum of liability coverage across selected insurers in the case.
- Type: The case type.
- Value From: The low end of the Estimated Value range of the case.
- Value To: The high end of the Estimated Value range of the case.

The firm Administrator can set which of the above columns are shown in a Case Browse search by default.

If any of the above columns have not been set or do not apply (e.g. "Closed Date" for a case that is not closed), those columns will be blank.

There is also one additional column which is always visible and is at the far left of the screen. Its header only contains a checkbox, as do each of the cells in the column. This column allows you to select cases for the use of the Mass Update function, described below. Clicking the checkbox in the column header will select all of the rows in the table. Clicking it again will deselect all of the rows in the table. After clicking the checkbox in the column header to select all of the rows in the table, you can then deselect any particular rows by unchecking the checkbox for those rows.

To the left of each column name is a small push-pin icon (). The default position for most columns is as pictured to the left, with the pin pointing to the left. Clicking on this icon will cause the pin to point down. The column will move to the left portion of the screen and the column will lock, so that as you scroll through the other columns the one(s) you have locked will remain visible. By default, the Case No. and Case Name columns are locked in this fashion, but you can lock or unlock any columns you wish. When exporting the search results to an Excel spreadsheet, any columns locked in the Case Browse results will remain locked in the spreadsheet, unless changed using the functionality in Excel.

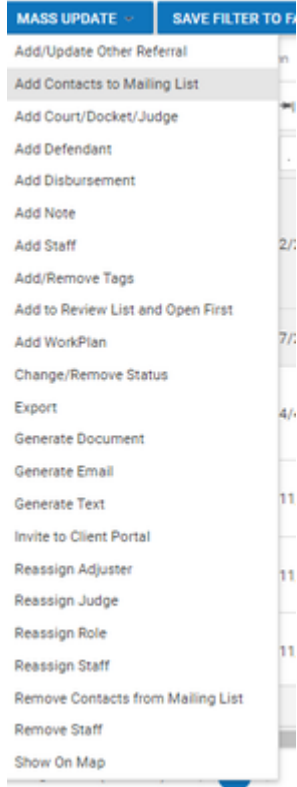


| <input type="checkbox"/> | Case No. | Case Name | Assigned Date | Closed Date | Closed Date/Time | Current Date | Open/Closed | Status Date | Minimum Date | Value From | Value To | Plaintiff | Plaintiff Insurance | Plaintiff # |
|--------------------------|----------|--------------|---------------|-------------|--------------------|--------------|-------------|-------------|--------------|------------|-----------|--|------------------------------|-------------|
| <input type="checkbox"/> | 100000 | Mass Update | 3/3/2014 | 3/3/2014 | 3/3/2014 11:23 AM | | Open | 11/28/2012 | 100 | | | South American International Insurance | 11 Century Insurance Company | |
| <input type="checkbox"/> | 100100 | Bob's Name | 7/28/2011 | 8/4/2012 | 8/4/2012 10:31 AM | | Open | 8/4/2012 | 100 | \$250,000 | \$750,000 | Bob, John | | |
| <input type="checkbox"/> | 100200 | Company Name | 4/4/2018 | 7/12/2018 | 7/12/2018 4:33 PM | | Open | 6/8/2020 | 100 | \$500,000 | \$750,000 | Michael, Douglas | | |
| <input type="checkbox"/> | 100300 | John, John | 7/11/2018 | 7/11/2018 | 7/11/2018 11:21 AM | | Open | 11/28/2012 | 100 | | | John, Joseph | State Farm Insurance | 1000000 |
| <input type="checkbox"/> | 100400 | John, John | 7/14/2018 | 8/3/2020 | 8/3/2020 11:49 AM | | Open | 11/28/2012 | 100 | | | John, Joseph | State Farm Insurance | 1000000 |

Mass Update and Saving Filters

To the upper left of the table are two buttons. One is labeled "Mass Update" with a triangular icon, and unless at least one of the rows in the table is selected, this button is greyed out. The other is labeled "Save Filter to Favorites." Clicking "Save Filter to Favorites" brings up a small panel consisting of a checkbox marked "Default," two radio buttons marked "Fill" and "Fill & Execute" (which are greyed out if "Default" is not checked), an input field marked "Filter Name," and a button marked "Save Filter." This panel allows you to keep the filter in your Favorites (see [Favorites](#) for details). To keep the filter in Favorites, simply fill in a name for the filter and click Save Filter. If you wish to have the filter be the default, and automatically fill itself in whenever you open the Case Browse screen, click the Default checkbox. You can additionally have the search be performed whenever you open Case Browse by


selecting "Fill & Execute." If you have selected at least one row, clicking "Mass Update" will reveal a list of actions you can take on all the selected cases at once. Those actions are as follows:

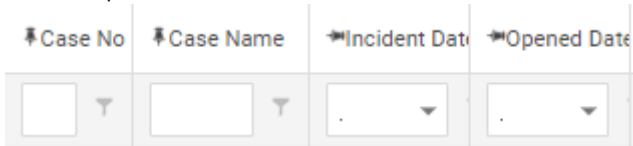


- **Add/Update Other Referral:** Brings up a small panel. At the top, there is a radio button to choose between adding, updating and removing a referral. Then a dropdown selection can be made to add a new other referral by name. Then the referrer's relationship to the firm can be indicated along with a date the referral was received. At the bottom, comments about the referral can be entered.
- **Add Contacts to Mailing List:** Brings up a small panel. At the top are several buttons that allow you to choose which types of case contacts will be added to the mailing list. Then either select an existing mailing list, or click on the New Mailing List button and name and describe the new list. Then click "Add Contacts". Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Add Court/Docket/Judge:** Brings up a small panel. Court can be selected via dropdown. Docket number can be entered and type of docket number indicated. Judge and Role can be selected via dropdowns.
- **Add Defendant:** Brings up a small panel with a dropdown to select additional defendant and their role. A new individual or organizational defendant can be added if necessary.
- **Add Disbursement:** Brings up the disbursement panel where the details of the disbursement can be entered into each of the checked cases.
- **Add Note:** Brings up a small panel with a dropdown labeled "Note Type:", an input field labeled "Note:", and two buttons labeled "Add Note" and "Cancel." To add a note to all selected cases, choose a note type, fill in the input field with your desired note, then click "Add Note." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Add Staff:** Brings up a small panel with a dropdown labeled "Staff," a dropdown labeled "Role," an input field labeled "Comments," and two buttons labeled "Add Staff" and "Cancel." To add a staff member to all selected cases, choose a staff member and a role, optionally add a comment, then click "Add Staff." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Add/Remove Tags:** Brings up a small panel with a dropdown in which tags can be multi-selected and then chosen to be added or removed from the case.
- **Add to Review List and Open First:** Opens a new tab where the selected case can be viewed in sequence by using the arrows in the top left hand corner of the quick add toolbar.
- **Add WorkPlan:** Brings up a small panel with a dropdown labeled "WorkPlan." To add a WorkPlan to all selected cases, choose the desired WorkPlan from the dropdown, then click "Add Staff." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Change/Remove Status:** Brings up a small panel with a dropdown labeled "Status Type:" (with "Status" chosen by default); a pair of radio buttons and a dropdown collectively labeled "Current Status:", with the radio buttons individually labeled "Select Status" and "All Statuses," and the dropdown greyed out if "All Statuses" is selected (which is the default); a dropdown labeled "New Status:", and two buttons labeled "Change Status" and "Cancel." To change the status of the selected cases, choose a new status, and optionally select a current status (doing so will prevent the status change from taking effect unless the current status of the case is the one chosen), a default comment stating "Bulk Change", which you can remove and/or change, and then click "Change Status." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Export:** Opens the Import/Export Cases tab with the selected cases pre-filled for export.
- **Generate Document:** Opens up the Mass Mailing tool with the selected case numbers already entered. See [Mass Mailing](#) for more details.
- **Generate Email:** Opens up the Mass Emailing tool with the selected case numbers already entered. See [Mass Emailing](#) for more details.
- **Generate Text:** Opens up the Mass Texting tool with the selected case numbers already entered. See [Mass Texting](#) for more details.
- **Invite to Client Portal:** Opens mass email function with the template "Invite Client Portal" pre-filled.
- **Reassign Adjuster:** Brings up a small panel with a dropdown labeled "From:", a dropdown labeled "To:", and two buttons labeled "Reassign Adjuster" and "Cancel." To replace a particular adjuster on the selected cases with a new adjuster, choose the current adjuster in the "From:" dropdown and the new adjuster in the "To:" dropdown, then click "Reassign Adjuster." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Reassign Judge:** Brings up a small panel with a dropdown labeled "From:", a dropdown labeled "To:", and two buttons labeled "Reassign Judge" and "Cancel." To replace a particular judge on the selected cases with a new judge, choose the current judge in the "From:" dropdown and the new judge in the "To:" dropdown, then click "Reassign Judge." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Reassign Role:** Brings up a small panel with a dropdown labeled "Staff:," a pair of radio buttons and a dropdown collectively labeled "Current Role:," with the radio buttons individually labeled "Select Role" and "All Roles," and the dropdown greyed out if "All Roles" is selected ("Select Role" is the default); a dropdown labeled "New Role:", and two buttons labeled "Reassign Role" and "Cancel." To reassign a staff member on the selected cases to a different role, choose a staff member and a new role, optionally select the current role (doing so will prevent the role change from taking effect unless the current role of the staff member is the one chosen), then click "Reassign Role." Clicking "Cancel" will discard anything you've entered into the form and close the panel.

- **Reassign Staff:** Brings up a small panel with a dropdown labeled "From:", a dropdown labeled "To:", an input field labeled "Comments:", three checkboxes labeled "Reassign Tasks", "Reassign Appointments," and "Reassign Medical Records Requests," and two buttons labeled "Reassign Staff" and "Cancel." To replace a particular staff member on the selected cases with a new staff member, choose the current staff member in the "From:" dropdown and the new staff member in the "To:" dropdown, optionally change the comment on the staff assignment (which is "Bulk change" by default), optionally include a reassignment of tasks and/or appointments and/or Medical Records Requests from the selected cases by selecting or deselecting the respective checkboxes, then click "Reassign Staff." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Remove Contacts from Mailing List:** Brings up a small panel. At the top are several buttons that allow you to choose which types of case contacts will be removed from the mailing list. Then either select an existing mailing list or click on the button labeled "Remove From All". Then click "Remove Contacts". Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Remove Staff:** Brings up a small panel with a dropdown labeled "Staff:," a pair of radio buttons and a dropdown collectively labeled "Current Role:," with the radio buttons individually labeled "Select Role" and "All Roles," and the dropdown greyed out if "All Roles" is selected ("Select Role" is the default); and two buttons labeled "Reassign Role" and "Cancel." To remove a staff member from the selected cases, choose a staff member, optionally select the current role (doing so will prevent the role change from taking effect unless the current role of the staff member is the one chosen), then click "Remove Staff." Clicking "Cancel" will discard anything you've entered into the form and close the panel.
- **Show on Map:** Opens up a new tab with a map of the United States and Canada. Red pins are visible, reflecting the *primary address* of the *primary plaintiff* in each chosen case. Clicking on any of the pins opens a small panel with the following information: Case number, Case name, date case opened, primary plaintiff's name, Case Status, Case Type, Referral source, and ZIP code of the primary plaintiff's primary address.

Pinned Columns

If you wish to keep some columns on the screen as you scroll to the right, you may click the pin icon () to the left of the column name you wish to keep on the screen. Columns that are not *pinned* in this way will have pin icons that point to the left, as shown above, and the data in the columns will have no background; columns that are pinned will have pin icons that point down, and the data in the columns will have a light blue background. Pinned columns will always be the left most visible columns (except for the selector column). By default, Case No and Case Name are initially pinned. Pinned columns cannot be placed to the right of unpinned columns; however, you can change the order of the pinned columns the same way as you change the order of unpinned columns.



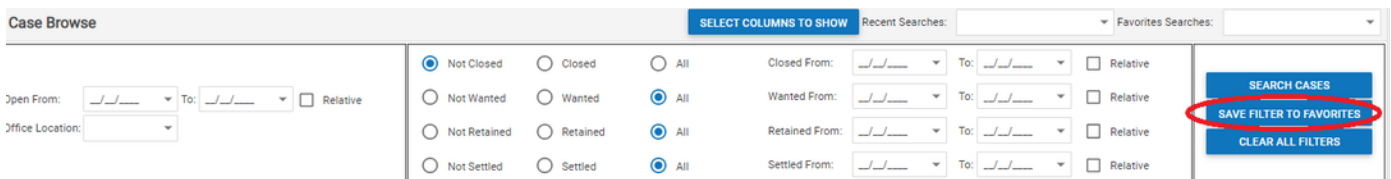
Other Features

The search results page includes a summary at the bottom left of the screen, which lists all of the conditions that comprise the current search. This summary is nearly identical to the one shown on the Case Browse screen itself before you perform the search. In addition to the usual export options, you have the option of emailing an exported file directly through SmartAdvocate. To do so, click the desired export icon listed after the text "Export and Email." This will generate the exported file, then bring up a panel allowing you to create an email to which the file is automatically attached.

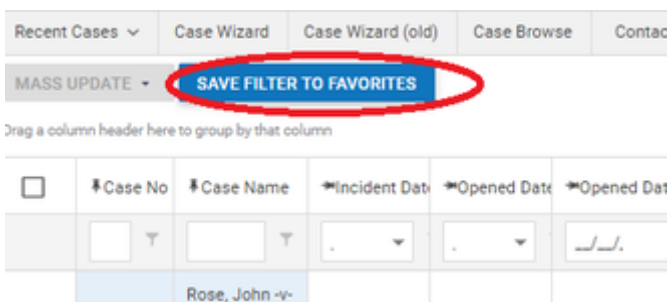
Save and Add New Filter to Favorites

Case Browse provides a number of ways to create or add a new Filter to your Favorites List.

1. Once you have selected the appropriate categories from the various Case Browse tabs, click on the button labeled "Save Filter for Favorites". A panel labeled "Save to Favorites" will appear containing two rows. The first row includes a button labeled "Default". Click the Default button if you want this filter to populate each time you open Case Browse. Then click either "Populate Filters", which will populate the Filters with the current settings but will not run the search, or click "Populate Filters and Search", which will automatically populate the Filters with the current settings and run the search whenever you open Case Browse.

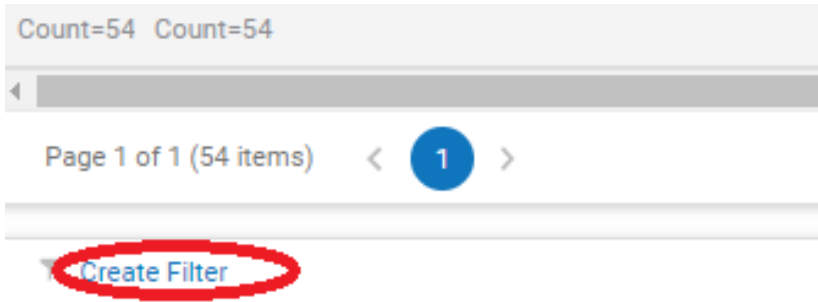


1. Once you have run the search, Case Browse provides two methods by which to save or create a Filter.
 - a. Click on the button labeled "Save Filter to Favorites". A panel labeled "Save to Favorites" will appear containing two rows. The first row includes a button labeled "Default". Click the Default button if you want this filter to populate each time you open Case Browse. Then click either "Fill", which will populate the Filters with the current settings but will not run the search, or click "Fill and Execute", which will automatically populate the Filters with the current settings and run the search whenever you open Case Browse.



To add a new Filter to your Favorites List, choose "Filter" then "New Filter". The Case Browse feature will appear.

1. a. Click on "Create Filter" link. See "Create Filter" for details.



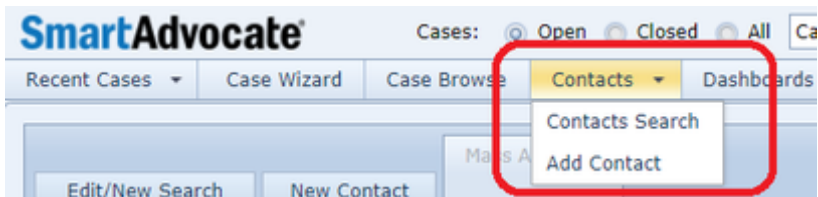
It is generally recommended that you run the Case Browse search first and then save the filter from the results page. This can help ensure that the filters chosen for the search provide the information sought (including the columns shown in the results).

Use Case Browse and Mass Update to Display Phone Number, SSN, DOB, etc. in Your Report

Use Case Browse and Predefined Templates to Send Mass Communications to Clients

Contacts

Clicking on the Contacts tab of the Top Tool Bar provides two options, "Contacts Search" and "Add Contact". Each option will be discussed in detail below.



Add New Contact

The Add New Contact panel allows you to create a new contact and fill in most of that contact's information. In the upper left of the panel, just under the heading of the Contact area, are two buttons, labeled "Organization" and "Individual." Clicking either of these will change the fields in the rest of the panel slightly to reflect the information necessary to create an organization contact or an individual contact, respectively. For that reason, when creating a new contact, it is important to make this selection before doing anything else. The panel consists of five areas:

- Contact: This area contains the most fundamental information about the contact. Besides the "Organization" and "Individual" buttons, this field consists of a number of inputs, which change entirely depending on whether Organization or Individual is selected. If Individual is selected, the inputs are as follows:
- Gender: Three radio buttons labeled "Male," "Female," and "Unknown," which reflect the gender of the contact. Selecting one of the options is necessary to save the contact.
- Last Name: A text input field. The last name of the contact. Inputting something in this field is necessary to save the contact.
- First Name: A text input field. The first name of the contact. Inputting something in this field is necessary to save the contact.
- Middle Name: A text input field. The middle name of the contact.
- Nick Name: A text input field. The nickname of the contact.
- Prefix: A dropdown. The prefix to the contact's name (e.g., Dr.).
- Suffix: A dropdown. The suffix to the contact's name (e.g., Esq.).
- Organization: A contact-widget dropdown. The organization employing the contact.

If Organization is selected, the inputs are as follows:

- Name: A text input field. The name of the contact. Inputting something in this field is necessary to save the contact.
- Other Name: A text input field. The alternate name of the contact.
- Office Hours: A text input field. The hours the contact organization is open.
- EIN #: A structured numeric input field. The employer identification number of the contact.
- Code: A text input field. The Employer Code of the contact.
- Phones: This area allows you to input the contact's phone numbers. It consists of four similar lines. Each has a dropdown (though the first one is greyed out with "Originating" as its fixed choice), a numeric input field structured like a phone number, a text input field, and a checkbox. All but the first also have a button with a duplication icon, which reveals the text "Copy from Originating" when hovered over. There are also four radio buttons in the panel, one at the beginning of each line. To input the contact's phone number, select the type of number from the dropdown, enter the number in the numeric field, write the extension (if any) in the text field, and select the checkbox if the number can receive texts. The first line is primarily used for intake or unfamiliar incoming phone calls; you can add a number on this line as a placeholder, while you are unsure of the specific phone number type, and then copy it to the correct phone number type when that type is determined. There is also a checkbox labeled "Use Organization Phones" in the title bar of this area. If the contact is an individual employed by an organization and you have entered the organization information, you may select "Use Organization Phones" to include the organization's phone numbers on the individual's contact card. Note, however, that such phone numbers are treated differently than the individual's own phone numbers; they may not be used in tables or merge codes associated with the individual. You must add a specific individual phone number to ensure that it is fully associated with the individual. (However, it is possible this behavior will change in a future release.)

The choices for phone type will vary depending on whether you are entering information for an individual or organization contact. The choices available for phone type are configurable by the firm Administrator.

- Address: This area allows you to input an address for the contact. It consists of the following:
- Address Type: A dropdown. The type of address (e.g. work, home, etc.) the rest of this area's fields represent. If you check the box labeled "Use Organization Address", the Address Type selected will be "From Organization" and the organization address will be automatically entered. The

choices for address type will vary depending on whether you are entering information for an individual or organization contact. The choices available for address type are configurable by the firm Administrator.

- Address 1: A text input field. The first line of the street address.
- Address 2: A text input field. The second line of the street address.
- ZIP: Two text input fields. The ZIP code of the address. Fill in the first five digits in the first field, and optionally the extended four digits (ZIP+4) in the second field. Filling in the first field partially will automatically bring up a list of all the ZIP codes beginning with the incomplete code. Select one of the presented codes by clicking its associated check-mark icon, and it will automatically fill in the city, county, and state as well. Filling in the first field completely will also automatically fill in the city, county, and state, unless there are multiple possible cities for the entered ZIP code, in which case the list of the possible cities for that ZIP code will be brought up.
- City: A text input field. The city in which the address is located. This field will be automatically populated based on the ZIP code, but the data can be overwritten.
- County: A text input field. The county in which the address is located. This field will be automatically populated based on the ZIP code, but the data can be overwritten.
- State: A dropdown. The state in which the address is located. This field will be automatically populated based on the ZIP code, but the data can be overwritten.
- Country: A dropdown. The country in which the address is located.
- Comments: A text input field. Any comments you wish to enter about this contact's address.
- Contact Miscellaneous Details: This area allows you to enter details about the contact. Most of the inputs in this area only appear when Individual is selected. If Individual is selected, the inputs are as follows:
 - Date of Birth: A date-widget dropdown. The contact's date of birth.
 - Date of Death: A date-widget dropdown. The contact's date of death.
 - SSN: A structured numeric input field. The contact's social security number.
 - Language: Two dropdowns. The languages spoken by the contact. Use the left dropdown for the contact's primary language, and the right dropdown for the contact's secondary language.
 - e-Mail: A text input field. The contact's email address.

If Organization is selected, there are only two inputs. One is e-Mail, which is the same as for individuals. The other is Website, a text input field, for the organization's website.

- Contact Type Details: This area allows you to choose the contact's type. This area normally has four inputs:
 - Contact Type: a dropdown. The contact's type (e.g. attorney, doctor, school, etc.). Selecting one of the options is necessary to save the contact.
 - Active: A checkbox. Whether the contact should be considered active by the SmartAdvocate system. Inactive contacts are excluded from searches by default.
 - Locked: A checkbox. If selected, a user will not be able to edit the contact card unless one of the user permission groups to which that user belongs has been given permission to do so. Such permission can only be granted by the firm's Administrator.
 - Prevent Mailing: A checkbox. If selected, most commands or actions that would send an email or mail to this contact will cause a warning to appear that the contact should not receive mailings. (You can override this warning for a particular mailing, should you choose to do so.) Additionally, selecting this checkbox allows you to prevent the contact from appearing in the list of recipients when using the [Mass Emailing](#), [Mass Mailing](#), or [Mass Mail Export](#) tools.

There are also possible additional inputs depending on the contact type chosen. The following contact types cause additional fields to appear in this area:

- Attorney: A text input field labeled "Bar Number:", for the attorney's bar number.
- Doctor, Diagnostic, Hospital, Medical Office, Nursing Home, Expert, or Pharmaceutical Manufacturer: Two dropdowns labeled "Specialty:" and "Sub Specialty:", for the contact's fields of specialization. The specialty chosen generates the available sub-specialties in the other dropdown, so it must be chosen first.
- Judge or Magistrate: Five input fields, labeled "Part #:", "Court Room #:", "Court Room Phone #:", "Chamber Room #:", and "Chamber Phone #:". Each field is for the information described by its respective label. The order of these fields is different for the Magistrate than for the Judge, but all the fields appear for both contact types.
- Police Officer: A text input field labeled "Badge #:", for the officer's badge number.

When you have filled out the information you wish to include in the contact's contact card, you may either click the "Save" button in the bottom right of the panel to save the contact and close the panel, or click the "Save & Open Full Contact Card" button next to it to save the contact, close the panel, and open the new contact's contact card in a new tab. See Contact Card for details. If, before you click one of the Save buttons, you decide not to create the contact at all, you may click either the "Cancel" button at the bottom right or the white X at the upper right to discard any entries in the input fields and close the panel.

This screenshot shows the 'Add New Contact' form with the 'Individual' radio button selected. The form is divided into three main sections: Contact, Address, and Contact Miscellaneous Details. The Contact section includes fields for Last Name, First Name, Middle Name, Nick Name, Organization, and Suffix. The Address section includes Address Type (set to Home - Primary), Address 1, Address 2, ZIP, City, State, and Country. The Contact Miscellaneous Details section includes Date of Birth, Date of Death, SSN, Language, and e-Mail. There is also a 'Contact Type Details' section with checkboxes for Active, Prevent Mailing, and Locked. At the bottom, there are buttons for Save, Save & Open Full Contact Card, and Cancel.

This screenshot shows the 'Add New Contact' form with the 'Organization' radio button selected. The form is divided into three main sections: Contact, Address, and Contact Miscellaneous Details. The Contact section includes fields for Name, Other Name, Office Hours, and EIN #. The Address section includes Address Type (set to HQ/Main Office), Address 1, Address 2, ZIP, City, State, and Country. The Contact Miscellaneous Details section includes e-Mail and Website. There is also a 'Contact Type Details' section with checkboxes for Active, Prevent Mailing, and Locked. At the bottom, there are buttons for Save, Save & Open Full Contact Card, and Cancel.

Contact Card

The Contact Card is where all of the information for a contact can be viewed and edited. The information in the contact card is divided into four tabs, only one of which is visible at a time; click the heading of the tab you want to access to bring up that tab's information. The four tabs are Main Details, Cases And Related Contacts, Notes And Documents, and Mailing Lists.

Main Details

This tab contains most of the basic information about the contact, in particular how to actually contact them. For individuals, it also contains some personal information. This tab is divided into eight areas for individuals, and seven for organizations. These areas are Contact, Role, Contact Type Details, Addresses, Phone Numbers, Email, Website, and Other Details (for individuals only).

Contact

This area is mainly for the contact's name and a couple of other essential details. It contains different information for organizations than for individuals. For organizations, there are fields for its name, an alternate name for the organization, its hours of operation, its Employer Identification Number, and its Employer Code.

For individuals, there is a button to select the person's gender, and fields for their last name, first name, middle name, and nickname. There are dropdowns for the person's prefix title (e.g. Dr.) and suffix title (e.g. Esq.). There is also a contact-widget dropdown for the organization that employs the person.

Note: The organization must be in your contacts to be chosen as the employer, although if it is not already there when you click on Organization, there is an "Add New Contact" button available that you can click to create the contact.

Role

This area is somewhat of a catch-all for data that doesn't fit elsewhere in the contact card. It contains a contact-widget dropdown for the individual or organization that referred this contact to you or your firm, a field for any comments you wish to store about the contact, and a list of all the roles this contact has served in at least one of your cases.

Notes: The list of roles is populated automatically by the SmartAdvocate system; you cannot edit it directly. The referrer must be in your contacts to be chosen, but the dropdown includes an "Add New Contact" button that you can click to create the contact if it is not already present.

Contact Type Details

This area is mainly for the contact's type (e.g. attorney, doctor, school, etc.). It also has some information that affects how the SmartAdvocate system handles the contact, and any follow-up information about the contact's type. At minimum, the area has a dropdown for the contact type, a checkbox for whether the contact should be considered active by the system (checked by default), a checkbox for whether the contact card is locked (uneditable by a user unless one of the user permission groups to which that user belongs has been given permission to do so), and a checkbox for whether mail and email should generally not be sent to the contact.

Addresses

This area is for all known physical addresses associated with the contact, both current and prior. It contains a list of addresses in the form of a table, where every row is a separate address, and every column is a separate piece of information about the address. Addresses can be added to this list, edited, and removed from this list. If the contact is an individual employed by some organization, then the organization's addresses will also be automatically shown in this table; however, these cannot be edited or removed.

The columns of the table are the address type (i.e. its purpose to the contact), the street address, spread if necessary over three columns, the city, the county, the ZIP code, the state, whether the address is the contact's primary address, a valid mailing address for the contact, and/or an address still associated with the contact at the current time, and any Comments that have been added to the address. There is also a column for the actions that can be taken on each address.

The action column contains three icons: a green pin, which opens the address in Google Maps in a new tab; a pencil, which opens an Add/Update Address Panel allowing you to edit the associated address; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion). The pencil and X icons will not appear in the rows for addresses belonging to the contact's employing organization. The Addresses area also has two buttons at the top right. Show Deleted Address brings up a panel with all the addresses that have been deleted from this contact, and Add New Address opens an Add/Update Address Panel allowing you to create a new address record.

Phone Numbers

This area is for all known phone numbers associated with the contact. It contains a list of phone numbers in the form of a table, where every row is a separate number, and every column is a separate piece of information about the number. Phone numbers can be added to this list, edited, and removed from this list. If the contact is an individual employed by some organization, then the organization's phone numbers will also be automatically shown in

this table; however, these cannot be edited or removed.

The columns of the table are the phone number type (i.e. its purpose to the contact), the number itself, any extension, whether it can receive text messages, and whether it is the primary phone number for this contact. There is also a column for the actions that can be taken on each phone number. The action column contains two icons: a pencil, which opens an Add/Update Phone Panel allowing you to edit the associated phone number; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion). The pencil and X icons will not appear in the rows for phone numbers belonging to the contact's employing organization.

The Phone Numbers area also has a button at the top right labeled Add Contact Number that opens an Add/Update Phone Panel allowing you to create a new phone number record.

Email

This area is for all known email addresses associated with the contact. It contains a list of addresses in the form of a table, where every row is a separate address, and every column is a separate piece of information about the address. Email addresses can be added to this list, edited, and removed from this list.

The columns of the table are the email address, a comment about the address, and whether it is the primary email address for this contact. There is also a column for the actions that can be taken on each email address.

The action column contains two icons: a pencil, which opens an Add/Update Email Panel allowing you to edit the associated email address; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion).

The Email area also has a button at the top right labeled Add Email that opens an Add/Update Email Panel allowing you to create a new email address record.

Website

This area is for all known websites associated with the contact. It contains a list of sites in the form of a table, where every row is a separate website, and every column is a separate piece of information about the site. Websites can be added to this list, edited, and removed from this list.

The columns of the table are the website URL and whether it is the primary website for this contact. There is also a column for the actions that can be taken on each website.

The action column contains two icons: a pencil, which opens an Add/Update Website Panel allowing you to edit the associated website; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion).

The Website area also has a button at the top right labeled Add Website that opens the Add/Update Website Panel allowing you to create a new website record.

Other Details

This area, which is only present for individuals, is for miscellaneous personal information about the contact.

If a picture of the contact has been uploaded, it will be displayed in this area. (If not, this space will display a generic blue person icon.) You can upload a picture by clicking Update Avatar, which will allow you to either Browse (search for any file on your computer or network to which you have access), Select an Image from any case to which the contact has been attached.

You can add the contact's social security number (or use a checkbox to indicate the contact does not have a social security number), the country of the contact's citizenship, the contact's date of birth and place of birth, the contact's date of death, the contact's Sub Category (whether Adult, Infant, Incompetent, or Deceased), the contact's EIN, the contact's height and weight, the contact's primary and secondary language, the contact's religion and race, the contact's mother's maiden name, the contact's marital status, marriage date, and marriage location, the contact's spouse's name, the contact's occupation, the contact's driver's license number and the state that issued the license, and an official ID number and the state that issued the ID.

Note: If the Date of Death field is filled in, the contact's Sub Category will automatically be set to Deceased and attempts to change the status will be ignored. If the Date of Birth field is set to less than eighteen years before today's date, the contact's Sub Category will automatically be set to Infant, but you can change that status manually.

Related Cases

| Case # | Case Name | Contact's Role | Case Type | Status Date | Status/Comment | Attorney | Settlement |
|----------|--|--|-----------------------------|-------------|---|-------------------|----------------|
| LD190051 | Fernandez, Allison -vs- Jones, Damon | Disbursement Payee | Ped Kdown-Not Mun-Not Death | 4/9/2019 | Pre-Sign 00 - New Lead | Simpson, Claude | |
| LD103 | Robinson vs Scrooge | (D)-Doctor | Knee Implant - Not Death | 3/11/2019 | Closed Case (Closed for the following reason: REJECT - NO CONTACT) | | \$750,000.00 |
| KV501531 | Robinson vs Scrooge | (D)-Doctor | Knee Implant - Not Death | 7/9/2019 | Pre-Lit 01 - PI New Case - Initial Letters to be Sent () | Vogelsberg, Karl | \$500,000.00 |
| HD103 | Robinson vs Scrooge | (D)-Doctor | Knee Implant - Not Death | 4/12/2019 | Pre-Lit 04 - PI Demand to Be Prepared | Dreier, Harry | \$800,000.00 |
| CS180081 | Miss Hinds, Mandy -vs- Miss Ramirez, Juanita | Witness | Auto-Not Mun-Not Death | 7/10/2019 | Case Settled - Periodic payments forthcoming | Simpson, Claude | \$825,000.00 |
| IS6087 | Kihotte, Don -vs- Gellar, Monica | Lienor Recovery Agent_Recovery Contact | Auto-State | 3/5/2019 | LIT 35 - S/C Served - Answers outstanding (test) | Selizhuk, Igor(T) | \$1,000,000.00 |
| JV501534 | Robinson vs Scrooge | Defendant - Passenger | Auto-Accident | 7/30/2019 | LIT 2F - Summons & Complaint Out for Service (Status comment. We are working on it. This comment is clearly too long and will not fit. We must shorten it! 1 Status comment. We are working on it. This comment is clearly too long and will not fit. We must shorten it! 2 Status comment. We are working on it. This comment is clearly too long and will not fit. We must shorten it!) | Vallines, Jose | \$1,000,000.00 |

This area is for all cases in the SmartAdvocate system in which this contact has some role. It contains a list of cases in the form of a table, where every row is a separate case, and every column is a separate piece of information about the case. This table is generated automatically by the SmartAdvocate system and no record can directly be added to, edited in, or deleted from this table.

The columns of the table are the case's case number, the case's name, this contact's role in the case, the case type, the date of the case's most recent change in status, the case's current status, and the primary attorney handling the case.

Related Contacts

| MAIN DETAILS | | RELATED CASES | RELATED CONTACTS | NOTES | DOCUMENTS(1) | MAILING LISTS | |
|-------------------|--------------|--------------------------------|--------------------------|------------------|--------------|---------------|--------|
| ADD/LINK EMPLOYEE | | LINK/ADD RELATED CONTACT | | Related Contacts | | | Export |
| Contact Name | Relationship | Contact Address | Email | Contact Number | Action | | |
| Rose, Moira | Spouse | 123 Main St, Brooklyn NY 11241 | marina@smartadvocate.com | (440) 390-2834 | ✎ ✕ | | |
| Rose, David | Child | 123 Main St, Brooklyn NY 11241 | marina@smartadvocate.com | (718) 777-7777 | ✎ ✕ | | |
| Rose, Alexis | Child | 123 Main St, Brooklyn NY 11241 | | | ✎ ✕ | | |

This area is for other contacts in the SmartAdvocate system that share some sort of relationship with this contact. It contains a list of contacts in the form of a table, where every row is a separate contact, and every column is a separate piece of information about the contact. Contacts can be added to this list, edited, and removed from this list.

The columns of the table are the related contact's name, the related contact's relationship to the main contact, and the related contact's physical address, email address, and phone number. There is also a column for the actions that can be taken on each related contact. The action column contains two icons: a pencil, which opens an Add/Update Related Contact Panel allowing you to edit the associated related contact; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion). The Related Contacts area also has two buttons at the top left. Add/Link Employee opens an Add/Update Related Contact Panel with "Employee" preselected, and unchangeable, in the relationship field. Link/Add Related Contact opens an Add/Update Related Contact Panel with nothing filled out, allowing you to add any type of related contact. Both allow you to choose from existing contacts or add a new contact. If an individual contact has an employer listed, that organization will be listed under Related Contacts.

Notes

| Main Details | | Related Cases | Related Contacts(2) | Notes | Documents | MAILING LISTS |
|-----------------|-----------|---------------|---------------------|--------|-----------|---------------|
| Add New Note | | Notes | | | | Export |
| Date | Full Name | Notes | Type | Action | | |
| No notes added. | | | | | | |

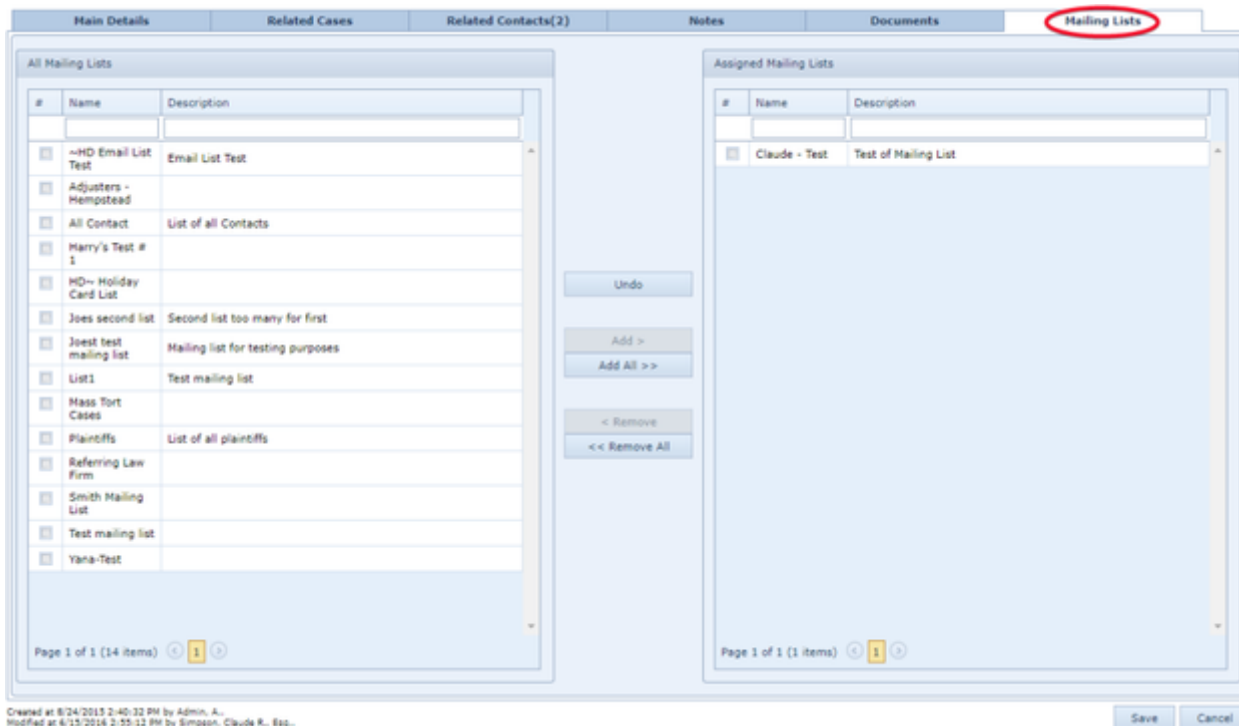
This area is for notes about the contact. It contains a list of notes in the form of a table, where every row is a separate note, and every column is a separate piece of information about the note. Notes can be added to this list, edited, and removed from this list. The columns of the table are the date of the note, the name of the staff member who created the note, the text of the note, the type of note it is (which will always be Contacts), and the priority level of the note. There is also a column for the actions that can be taken on each note. The action column contains two icons: a pencil, which opens the Edit Note Panel allowing you to edit the associated note; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion). The Notes area also has a button at the top left labeled Add New Note that opens the Edit Note Panel allowing you to create a new note. If there are any notes in this area, the Notes tab will include the number of notes in parentheses after the word "Notes."

Documents

| Main Details | | Related Cases | Related Contacts(2) | Notes | Documents | MAILING LISTS |
|---------------------|------|-------------------|---------------------|-------|-----------|---------------|
| Add New Document | | Contact Documents | | | | Export |
| Date | Type | Comments | Actions | | | |
| No documents added. | | | | | | |

This area is for documents pertaining to the contact. It contains a list of documents in the form of a table, where every row is a separate document, and every column is a separate piece of information about the document. Documents can be added to this list, viewed, edited, and removed from this list. The columns of the table are the date the document was created, the name of the document, and any comments about the document. There is also a column for the actions that can be taken on each note. The action column contains three icons: a piece of paper with a green arrow, which opens the document; a pencil, which opens an Add/Update Document Panel allowing you to edit the associated document; and a red X, which allows you to delete the record (there will be a confirmation message first to prevent accidental deletion). The Contact Document area also has a button at the top right that opens an Add/Update Document Panel allowing you to upload a new document. If there are any documents in this area, the Documents tab will include the number of documents in parentheses after the word "Documents."

Mailing Lists



This tab allows you to manage which mailing lists the contact is on. This tab contains two lists of mailing lists in the same table format. One table contains all the mailing lists that have been created in the system to which the contact does not already belong, and the other contains the mailing lists to which the contact does belong.

The columns of each table are a checkbox for selecting that list, the name of the list, and the description of the list.

You can display only a subset of the mailing lists in a table by using the filter row for that table. This can be useful if, for example, you prefix mailing lists by the type of contact that should belong to them (such as "Doctors - Available for Expert Testimony" or "Clients - Settled, Checks Not Received"). In particular, it is useful in conjunction with the "Add All >>" and "<< Remove All" buttons (see below).

To add the contact to a mailing list, click the checkbox for that mailing list, then click the "Add >" button. (You must click the checkbox, or at least somewhere in the cell containing it; clicking elsewhere in the row will do nothing.) You can add the contact to multiple mailing lists at once by clicking each one's checkbox, then clicking the "Add >" button once you have selected the checkboxes for all the mailing lists to which you want to add the contact; alternately, you can move them one at a time by clicking a checkbox, then clicking "Add >," then clicking another checkbox, then clicking "Add >" again, etc., but that would take longer. To remove the contact from a mailing list they are currently on (or one you just added them to), click the checkbox for that mailing list, then click the "< Remove" button. Removing a contact from multiple mailing lists at once works essentially the same way as adding them to multiple mailing lists. To add the contact to all the mailing lists currently visible in the All Mailing Lists table, click the "Add All >>" button. To remove the contact from all the mailing lists currently visible in the Assigned Mailing Lists table, click the "<< Remove All" button. For both of these "All" buttons, you can use the filter row to specify a subset of the lists in the table to be moved. This can be a more efficient way of moving the contact from or to multiple mailing lists than doing so checkbox-by-checkbox. To undo all the changes you have made in this tab since the last time you saved the contact, click the "Undo" button.

Saving

To save any changes you have made to the contact card and close it, click the Save button in the lower right of the contact card screen. To discard changes and close the contact card, click the Cancel button. The Save and Cancel buttons are accessible from any of the four tabs. Note: some changes are saved separately from the Save button and thus cannot be undone by the Cancel button either. These include, but may not be limited to, edits /additions of addresses, phone numbers, email addresses, and websites.

Contact Search Criteria

On the first line of the Contact Search Criteria panel is a set of three radio buttons, labeled "Individual," "Organization," and "All," and a checkbox labeled "Show Active Only." If the checkbox is selected (which is the default), only contacts marked active will be returned by the search; otherwise, both active and inactive contacts will be returned. The radio button is used to limit the results to only contacts who are individuals, only contacts that are organizations, or to accept both types of contacts into the results. The available fields in the rest of the panel will change somewhat depending on which of the three radio buttons is selected. If "Individual" is selected, the rest of the panel will consist of the following:

- Last Name: A text input field. Returns only contacts whose last name *begins with* the provided search string.
- First Name: A text input field. Returns only contacts whose first name *begins with* the provided search string.
- Contact Type: A dropdown. Returns only contacts whose contact type matches the one chosen.
- Case Role: A dropdown. Returns only contacts who hold the chosen role in at least one case.
- Address: A text input field. Returns only contacts whose street address *contains* the provided search string.
- City: A text input field. Returns only contacts whose city *begins with* the provided search string.
- County: A text input field. Returns only contacts whose county *begins with* the provided search string.
- State: A dropdown. Returns only contacts whose state *matches* the chosen one.
- Zip From: / Zip To: Two text input fields. Returns only contacts whose ZIP code is identical to or after the one in the first field, and identical to or before the one in the second field. Filling in only one of the two fields will return only contacts whose ZIP code is identical to the one in the filled-in field. Note: the comparisons are alphabetical, not numerical, so that, for example, if you put 9999 in the first field and 100000 in the second, there will never be any results because 9999 is considered alphabetically to be after 100000. Use five-digit numbers in both fields for best results.
- Comment contains: A text input field. Returns only contacts whose contact comment *contains* the provided search string.
- Phone: A text input field. Returns only contacts whose phone number *contains* the provided search string.
- Date of birth from: / to: Two date-widget dropdowns and a checkbox labeled "Any year." If "Any year" is not selected, returns only contacts whose date of birth is equal to or later than the one in the first field, and equal to or earlier than the one in the second field. If "Any year" is selected (which is the default), returns only contacts whose birthday would fall in the range beginning at the date in the first field for some given year (ignoring the year listed in the field), and ending at the subsequent instance of the date in the second field (ignoring the year listed in the field). For example, if the first field read 7/4/1776 and the second field read 2/14/2000, any date between July 4th and the next February 14th (e.g. January 1st) would qualify.
- Language: A dropdown and a checkbox labeled "Primary." If "Primary" is not selected, returns contacts whose primary or secondary language is the chosen one. If "Primary" is selected, returns only contacts whose primary language is the chosen one.
- Mailing Lists: A dropdown that allows multiple selections. Returns only contacts that are members of at least one of the selected mailing lists.
- Exclude Prevent Mailing: A checkbox. If selected, returns only contacts that do not have "Prevent Mailing" selected in their contact card.
- Exclude Allow Mailing: A checkbox. If selected, returns only contacts that do have "Prevent Mailing" selected in their contact card.
- Exclude Deceased, Incompetent And Infant: A checkbox. If selected, returns only contacts that do not belong to the Deceased, Incompetent, or Infant subcategories.

If "Organization" is selected, the panel will differ from the Individual panel in the following ways:

- Last Name and First Name are not present. In their place is Organization Name: A text input field. Returns only contacts whose name *contains* the provided search string.
- Contact Type functions the same way, but the available options are different.
- Date of Birth and Language are not present.
- Exclude Deceased, Incompetent, And Infant is not present.

If "All" is selected, the panel will be identical to the Organization panel except for two things: Contact Type will contain all the options from both Individual and Organization, and instead of Organization Name, there is a text input field labeled "Name:", which returns only contacts whose name *contains* the provided search string. However, it treats the names of individuals as being of the form "[Last Name], [First Name]" for the purposes of matching. Therefore, to search by a person's full name using the "All" panel, you must use exactly that form, including the comma and single space. (However, if you know you are searching for a first and last name, it is probably better to just select "Individual" and search from there.)

Whichever radio button you select, you may fill out as many or as few fields as you prefer, then click the "Submit" button at the bottom to perform the search, which will close the panel and present the search results in the tab you are currently in. Before you click "Submit," you may click either the "Cancel" button at the bottom or the white X at the upper right to discard any entries in the search fields and close the panel, which will return you to the search results you were already viewing (blank if you opened the search via the top tool bar, or possibly populated if you are editing a previously performed search). If you do not enter data into any of the fields, upon clicking on Submit you will receive results including all Active contacts in the system, or all contacts if the Show Active Only box is not checked.

You can search multiple names by using the pipe (|) character separation. For example:

Robinson, ellen | Selizhuk | geico

will find all contacts with last name Robinson and first name Ellen, all contacts with last name or organization name Selizhuk, and all contacts with last name or organization name GEICO.

Contact Search Results

General Structure and Table Columns

| | Last/Organization Name | First Name | Contact Type | Birth Date | Address | City | State | Zip | Phone No. |
|--------------------------|---|------------|----------------|------------|---|------------|-------|-------|----------------|
| <input type="checkbox"/> | Dr. James Floyd | | Medical Office | | Jefferson Clinic PC 1515 6th Avenue South | Birmingham | AL | 35233 | (205) 279-2860 |
| <input type="checkbox"/> | Caban | Julia | Adjuster | | | | | | |
| <input type="checkbox"/> | Wato | Jaime | Doctor | | 56-43 Main Street | Flushing | NY | 11355 | (718) 670-1837 |
| <input type="checkbox"/> | Northwell Health LLC Community Hospital | | Hospital | | 300 Community Drive | Manhasset | NY | 11030 | (516) 762-0100 |
| <input type="checkbox"/> | Darby | Jean | Adjuster | | | | | | (516) 576-2754 |

When you search for a mailing contact, the search results will be provided to you in the form of a table where each row contains the information from an individual result. The information is separated into a series of columns, each of which relates to a particular category of information. If there are more rows in the current page of the table than your screen can show, you can use the scroll bar on the right (or whatever means of scrolling through a website you prefer) to scroll through the results. If there are more columns in the table than your screen can show, you can use the horizontal scroll bar immediately below the visible portion of the table (and just above the pagination tool) to scroll through the columns. You can control which columns are visible in the results by using the Show/Hide Columns button. The available columns are:

- Last Name; Organization Name; Last/Organization Name: which of these is present depends on the search criteria. When searching for an individual, Last Name will be present; when searching for an organization, Organization Name will be present; when searching for both (or searching via the Quick Contact Search), Last/Organization Name will be present. In any case, if the contact is an individual, this will contain the contact's last name; if it is an organization, this will contain the contact's name. Clicking the name in this column will open the contact's contact card in a new tab.
- First Name: The contact's first name. Always blank for organizations. This column is technically available in the Column Chooser even when searching only for organizations, but even if you drag it into the table, it will automatically remove itself again when any other action is taken.
- Other Name: The contact's other name (for organizations) or nickname (for individuals).
- Prefix: The prefix for the contact's name (e.g., Dr.). Always blank for organizations.
- Suffix: The suffix for the contact's name (e.g., Esq.). Always blank for organizations.
- Birth Date: The contact's birth date. Always blank for organizations.
- Contact Type: The contact's contact type.
- Specialty: The contact's specialty (for experts, doctors, hospitals, and medical offices).
- Subspecialty: The contact's subspecialty (for experts, doctors, hospitals, and medical offices).
- Comments: The comments in the contact's contact card.
- Address: The first line of the contact's primary address.
- City: The city of the contact's primary address.
- State: The state of the contact's primary address.
- Zip: The ZIP code of the contact's primary address.
- Phone No.: The contact's primary phone number.
- Email: The contact's primary email address.
- Organization: The organization employing the contact. Always blank for organizations.

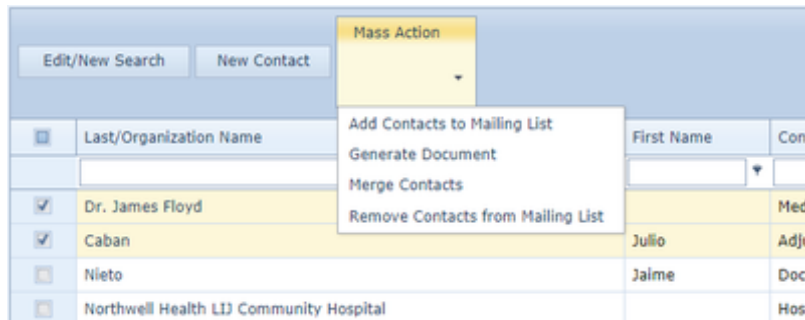
If any of the above columns have not been set or do not apply (e.g. "Specialty" for a non-medical contact), those columns will be blank.

There is also one additional column which is always visible and is at the far left of the screen. Its header only contains a checkbox, as do each of the cells in the column. This column allows you to select cases for the use of the Mass Action function, described below. Clicking the checkbox in the column header will select all of the rows in the table. Clicking it again will deselect all of the rows in the table.

Mass Action, Edit Search, New Contact

To the upper left of the table are three buttons. The first is labeled "Edit/New Search." The second is labeled "New Contact." The last is labeled "Mass Action" with a triangular icon, and unless at least one of the rows in the table is selected using the checkbox, this button is greyed out. Clicking "Edit/New Search" will bring up the Contact Search Criteria panel with all the criteria from the current search (if any) filled in. Clicking "New Contact" brings up the [A](#)

[dd New Contact](#) panel. If you have selected at least one row, clicking "Mass Update" will reveal a list of actions you can take on all the selected contacts at once. Those actions are as follows:



- **Add Contacts to Mailing List:** Brings up a small panel that allows you to either add the selected contacts to an existing mailing list or create a new mailing list and add the selected contacts to that one. The panel contains two radio buttons, one labeled "Select Mailing List" and the other labeled "New Mailing List." Associated with "Select Mailing List" is a dropdown containing all existing mailing lists; if the "New Mailing List" radio button is selected, this dropdown is greyed out. Associated with "New Mailing List" is a text input field, and a larger text input field labeled "Description:"; if the "Select Mailing List" radio button is selected, these fields are both inaccessible. To choose an existing mailing list to add the contacts to, select the "Select Mailing List" radio button then choose the desired mailing list from the dropdown options. To create a new mailing list to add the contacts to, select the "New Mailing List" radio button, enter the desired name of the list in the smaller text input field, then enter a description for the list in the larger text input field. In either case, once you are done, click the "Add Contacts" button at the bottom to add the contacts to the mailing list (and create the list itself, if applicable). At any time before clicking the "Add Contacts" button, you can click the "Cancel" button at the bottom or the white X in the upper right to discard any changes and close the panel.
- **Generate Document:** Brings up a panel that allows you to generate documents from a template, one document for each of the selected contacts. The panel contains a dropdown allowing you to optionally choose the template group the template is in, and another dropdown allowing you to choose the particular template from the selected group (or from all templates if you did not select a particular group). There is a checkbox allowing you to cause each generated document to automatically be added to its respective contact's [Contact Card](#) in the Notes and Documents section; if the checkbox is selected (which it is by default), you can select the document type and description. Finally, there is a dropdown to select the relevant office, for merge codes involving the office. Note: Because the document is being generated based on a contact and not a case, merge codes that rely on case-specific information will not function. Only codes that apply to contacts, or to firm information generally, will function. You can click the Analyze button once the template has been selected to see if any of its merge codes will fail to function.
- **Merge Contacts:** Brings up a panel that allows you to combine the information from multiple contact cards into a single contact, deleting each of the other contacts. This is used primarily if you have multiple contacts that refer to the same person or entity and want to prevent duplication and confusion. The panel contains a radio button list with each of the selected contacts listed, along with the address information of each contact. It also includes several checkboxes. To use this panel, click the radio button next to the one contact that should be kept. Select the checkboxes next to the information you wish to include from the contacts that are not being kept. The checkbox options include the physical addresses, documents in the contact cards, notes in the contact cards, website addresses, the contact comments, email addresses, telephone numbers, and any other field that is unused in the contact being kept. If contact comments are copied, they will simply be appended to the comments of the contact being kept, and the Other Details Fields option may behave unpredictably when there are more than three contacts being combined into a single contact; for all other options, the copied information will simply be added as a new line in the respective table in the contact card of the contact being kept.

Note that you cannot merge Individual and Organization contacts. If the contacts you have chosen include both Individuals and Organizations, you will receive an error message stating that you "Can't merge individual contact and organization".

- **Remove Contacts from Mailing List:** Brings up a small panel that allows you to either remove the selected contacts from a particular mailing list or remove the selected contacts from all mailing lists. The panel contains two radio buttons, one labeled "Select Mailing List" and the other labeled "Remove From All." Associated with "Select Mailing List" is a dropdown containing all existing mailing lists; if the "Remove From All" radio button is selected, this dropdown is greyed out. To choose an existing mailing list to remove the contacts from, click on the "Select Mailing List" radio button then choose the desired mailing list from the dropdown options. To remove the contacts from all mailing lists, select the "Remove From All" radio button. In either case, once you are done, click the "Remove Contacts" button at the bottom to actually perform the action of removing the contacts. At any time before clicking the "Remove Contacts" button, you can click the "Cancel" button at the bottom or the white X in the upper right to discard any changes and close the panel.

Contacts Video

The 'Prevent Mailing' Feature in SmartAdvocate

How to add client's signature to their contact card

Dashboards

[Dashboards Overview](#)

[Client Contact Overdue Dashboard and Report](#)

[Cases With Overdue Status Dashboard](#)

[My Cases Dashboard](#)

Dashboards Overview

SmartAdvocate dashboards provide quick overviews of various aspects of your firm's caseload and metrics of performance. The following is a brief summary of each dashboard's purpose and layout. Legacy dashboards, which remain in the system for the sake of consistency but have become obsolete or are otherwise not recommended for use, are not listed here.

- **Advertisement Campaigns (in Financial Dashboards):** Displays information about cases that have been referred to your firm by specific advertising campaigns, broken down either by advertisement venue or further by the time period of each campaign for each advertisement venue. The information displayed includes the beginning and end dates of the campaign, the amount spent on the campaign; the total fees generated; the

number of total calls, cost per call, calls wanted, resulting cases retained, cost per cases retained, resulting cases leading to a fee, the average fee, and resulting cases closed without a fee.

- **Settlement/Fee Production (in Financial Dashboards):** Displays information about settlements and fees generated. Includes separate breakdowns by staff member, by case group, and by referral source. Information displayed includes number of settlements; total settlement value; average settlement value; total fees earned, recorded, and still outstanding; average fees earned; the time from the opening of the case to the settlement; the number of checks received; the total of the checks received; number of fees recorded; total fees recorded; and the average time from the opening of the case until the fee was received. Note that in this context, the term "Settlement" refers to any funds received on behalf of a client upon the resolution of a case, whether by way of a settlement, judgment, arbitration, or otherwise.
- **Settlement Dashboard (in Financial Dashboards):** Displays visualizations of settlement generation data. Visualization formats include tables, line graphs, and percentage meters. Data can be filtered and broken down by various metrics. Note that in this context, the term "Settlement" refers to any funds received on behalf of a client upon the resolution of a case, whether by way of a settlement, judgment, arbitration, or otherwise.
- **Closed Cases Analysis (in Financial Dashboards):** Displays information about cases closed in a selected date range. Cases can be grouped by staff member and further broken down by case group, or vice versa. Information displayed includes the total number of cases closed, the numbers closed with and without a fee, the percentage closed with a fee (CWF%), the total and average fee and the total disbursement write-off.
- **Client Contact Overdue (in Overdue Dashboards):** Provides an overview of cases where the plaintiff is overdue to be contacted. The overview includes the case number and type, plaintiff name and phone information, case status, the number of days since contact became overdue, the last plaintiff contact note, the last note overall, and critical comments. There are also icons that allow the entry of a new Note or Quick Note.
- **Attorney File Review Overdue (in Overdue Dashboards):** Provides an overview of cases for which a file review is overdue. The overview includes the case number and type, plaintiff name and phone information, case status, the number of days the case has been in that status, and the last file review note. There are also icons that allow the entry of a new Note or Quick Note.
- **Supervisor File Review Overdue (in Overdue Dashboards):** Provides an overview of cases where a file review by a supervisor is overdue. The interface is nearly identical to the Attorney File Review Overdue dashboard, except that the last supervisor file review note is listed instead of the last file review note.
- **Stage Overdue by Staff (in Overdue Dashboards):** Provides an overview of cases, listed by staff member, where one or more stages are overdue. The report can list all staff or only those with cases in an overdue status. Various other report criteria are listed at the top of the report, with radio buttons that permit you to choose which criteria should apply. Note that the number in the bottom row, labeled "All Overdue Cases Count", may not equal the total of cases listed in that column by staff member, as a case can have multiple overdue statuses for multiple staff members.
- **Attorney Performance Dashboard (in Performance Dashboards):** Displays information about cases assigned to a particular attorney, or all attorneys, within a selected date range. Information displayed includes number of cases assigned, closed, and currently open; average time on desk, number of settlements, average settlement amount, and total settlement amount; number of new Notes added; number and percentage of cases in which client contact is overdue; and number and percentage of cases in which file review is overdue. Also displays a breakdown of cases currently in each litigation status, and the total time for cases in the litigation stage.
- **Demand Production Dashboard (in Performance Dashboards):** Displays a breakdown of demand statistics by staff member. Statistics for each staff member include the total number of cases in which a demand was made, the average number of months between the opening of a case and the first demand in the case, the average number of months between the date of maximum medical improvement (MMI) and the first demand, and the average number of months between the date all records were received (ARR) and the first demand.
- **Intake Performance Dashboard (in Performance Dashboards):** Displays information about intakes and retainers in a selected date range. Cases can be grouped by staff member and further broken down by case group, or vice versa. The results can be filtered by Date Range, Case Type, Staff Type, Sign Type, Referred In, and Office. Information displayed includes the total number of intake inquiries, the number wanted by your firm, the number and percentage retained (Signed Up) by your firm, the conversion percentage, the overall percentage retained, the number of true signups, the number of cases retained by firms your firm attempted to refer the cases to, the number of chase calls made, and the average time between the date that a retainer was sent to the prospective client and the date the signed retainer was returned.
- **Intake Dashboard (in Performance Dashboards):** Displays visualizations of intake and retainer data. Visualization formats include tables, line graphs, and percentage meters. Data can be filtered and broken down by various metrics.
- **Prelit Unit Status (in Performance Dashboards):** Displays information about the year-to-date fees and settlements of non-mass-tort cases, broken down by case manager. Information displayed includes the average fee, average number of days between the case opening and settlement date, fees deposited, number of active cases, and number of MMI cases.
- **Staff Performance-File Review-Client Contact (in Performance Dashboards):** Displays information about the caseload of attorneys and case managers. Information includes the total number of cases, the number and percentage of cases in which client contact is overdue, the number and percentage of cases in which supervisor file review is overdue.
- **Litigation Stage (in Stage Dashboards):** Displays a breakdown of cases currently in each litigation status. Cases are included in the dashboard based on optional selections of case staff, referral status, mass tort or single event, presence of serious injury, and office.
- **Pre-Litigation Stage (in Stage Dashboards):** Identical to Litigation Stage, but for pre-lit statuses.
- **Sign Up Stage (in Stage Dashboards):** Identical to Litigation Stage, but for presign statuses.
- **Case Review:** Provides an overview of a subset of cases. Cases are included in the dashboard based on optional selections of case staff, status, and type. The overview includes the case status, plaintiff phone information, the last five notes, incident date and facts, quick injuries, and UDFs.
- **Case Statistics:** Provides statistics representing the number of cases in a particular date range that have experienced various types of activity, in particular new inquiries, sign ups, closures, referrals, offers, and settlements. Parameters include the date range in the form of numbers of days before the current date, case groups, case types, statuses to include in the signup breakdown, and advertisers that should appear in the inquiry breakdown even if they generated no inquiries during the date range.
- **Close Reason Statistics:** Breaks down the cases closed during a selected time range by the reason for the closure.
- **Intake Follow Up Dashboard:** Identical in function to the My Cases dashboard (see below), except that only cases in a selected group of case statuses, set in the [System Parameters](#) administrative page, appear in this dashboard.
- **Intake Review:** Used by the intake manager to view and approve or reject status changes to cases that have not yet been retained. Provides information about the status change, case documents, basic case details, and answers to UDF questions.
- **Map Dashboard:** Displays the location of case plaintiffs on a map. Cases can be filtered by advertising referral source, case type, and location (county and ZIP code). You can also limit the map to only those cases that have been retained or only open cases.
- **Medical Records Requests Follow-Up:** Displays information about outstanding medical requests (external requests by default) assigned to a selected staff member (or all staff members) that have not been completed and allows the request documents to be generated. The displayed information includes the case priority level, basic case information, medical provider information, records requested, request status and the date of that status, and follow-up date.
- **Medical Records Requests To Go Out:** Identical in function to the external version of the dashboard, except with a different default for which request statuses are shown (internal instead of external), and without the request status date and follow-up date.
- **My Medical Records Requests:** Displays information about medical requests assigned to the user. Information displayed includes priority level, case number, plaintiff, medical provider, request date, record type, information regarding the request, request status and status date, and follow-up date.
- **My Cases:** Displays basic information, including plaintiff contact information, about open cases. The listed cases can be limited to those involving a selected staff member (the user by default) or all staff members, or with no new notes for a selected number of days. The Add Note/Comment column includes icons for the entry of a Note, Quick Note, or Critical Comment.
- **Negotiation Follow-Up:** Displays information about the status of unresolved negotiations. The information includes the number of the associated case, the plaintiff who is the subject of the negotiations, the incident date and earliest SOL in the case, the number of days the case has spent in its

current status, the information about the company being negotiated with, the most recent negotiation date, demand, offer, and comments in the negotiation with the company, the last Negotiation note in the case, the staff member performing the negotiation, and icons for creating a new note and a new demand and offer in the negotiation.

- **New Cases:** Displays breakdowns of intakes by referral source, of retained cases with no listed medical provider by number of days since retainer date, and of recovered clients, retained cases, cases with a serious injury, and cases with a corporate or municipal defendant, each by date of retainer.
- **Intake Statistics:** Provides details of new inquiries by referral source, in both chart and visual formats, with breakdowns by current time periods as well as previous years.
- **Open Cases:** Breaks down the number of cases open each of the last twelve months by case group and displays the results in both table and graph forms.
- **Referred Out Firm Follow-Up:** Displays information about cases that have been referred to other firms. Cases can be filtered by the law firm to which the case was referred. The information displayed includes the case number, name, type, and status, the number of days the case has been in its current status, the law firm the case was referred to, its phone number and file number, the most recently created note, the most recent note of type Out Firm Update, and the number of days since the last note.
- **Presign - Signup Not Scheduled:** Displays information about cases with the status Presign - Not Yet Scheduled for Sign Up. The information displayed includes the case number, type, and subtype, the plaintiff's name, the intake paralegal assigned to the case, the paralegal assigned to the case, the plaintiff's primary phone number, the number of days that the case has been open, the incident state, and the last note on the case. There are also icons that directly open the case's [Incident](#) and [Plaintiff Summary](#) pages, and an icon that opens a panel in which most of the basic information in the case can be edited and a Note added. A button on the bottom right side of the report allows the exclusion from the report of any cases on which the user has added a Note that day.
- **Problem Cases:** Lists cases where there are one or more issues with the case file. Issues listed in this dashboard include a blank Incident Facts field, no attorney on the case, no defendant, no retainer date, a missing plaintiff, and a referral without a name. You can select the type of issue (warning type) which will cause a case to be listed in the report. The column to the far right lists the warning type applicable to each case.
- **Retained Cases:** Contains information about calls, cases wanted by your firm, and retained cases, for set time periods.
- **SignUp Kit To Go Out:** Displays information about cases with the status Sign Up Kit To Go Out. The information displayed includes the case number and type, the plaintiff's name and email address, case status, the number of days the case has been in that status, the incident state, the law firm that referred the case to your firm if any, the incident facts, and the last note.
- **Single Event Case Listing:** Displays information about open cases in a stage other than Presign that are not mass tort cases. The information displayed includes the case number, type, status and time spent in that status, the plaintiff's name, the incident date, the earliest SOL date, the date of the earliest negotiation demand, the estimated case value, the insurance information for the plaintiff and defendant, the injury information, and the incident facts.
- **Statute of Limitations:** Breaks down the critical deadlines in open cases, listing the number of deadlines due in various time ranges from those past due to up to 120 days in the future. The cases can be filtered by case group, type, whether the case is a mass tort case, whether the case has been retained, and whether a selected staff member is involved in the case. If the report is blank when first run, click on the "Apply Filter" button. Click on any number in the table to obtain a list of all cases included in that number.
- **Tasks:** Displays information about tasks. Tasks can be filtered by task status, requestor, assignee, creator, case status, and due date. The information displayed includes the task's type, due date range, subject, description, priority level, requestor, assignee, and status, and the associated case name and number. A column in the table permits the entry of a date on which the task was completed; by utilizing the check boxes on the left of each task listed, multiple tasks can be marked complete simultaneously.

Cases With Overdue Status' Dashboard

Client Contact Overdue Dashboard and Report Overview

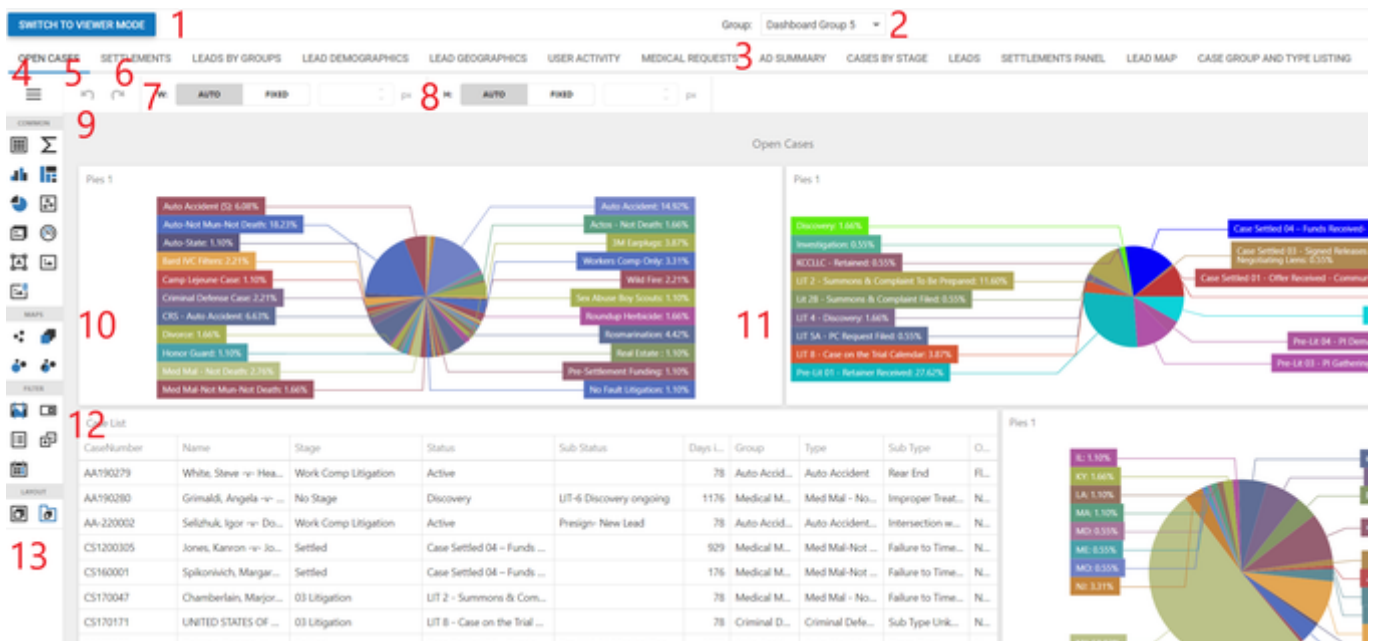
Client Contact Overdue Dashboards and Reports

Dashboard Designer

This page is currently under construction. Check back for more updates!

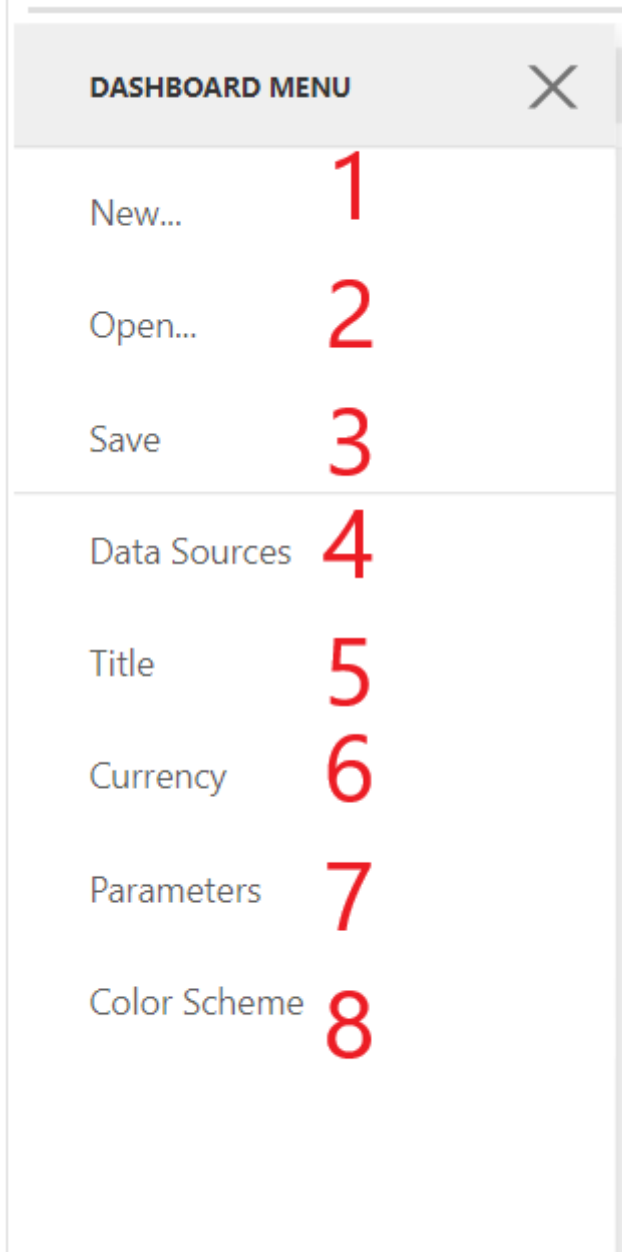
The Dashboard Designer allows you to create custom dashboards, individualized to your firm. As this is a new feature released in March 2022, the data sources and functionality of this dashboard designer are constantly being worked on and evolving.

Structure of this Page



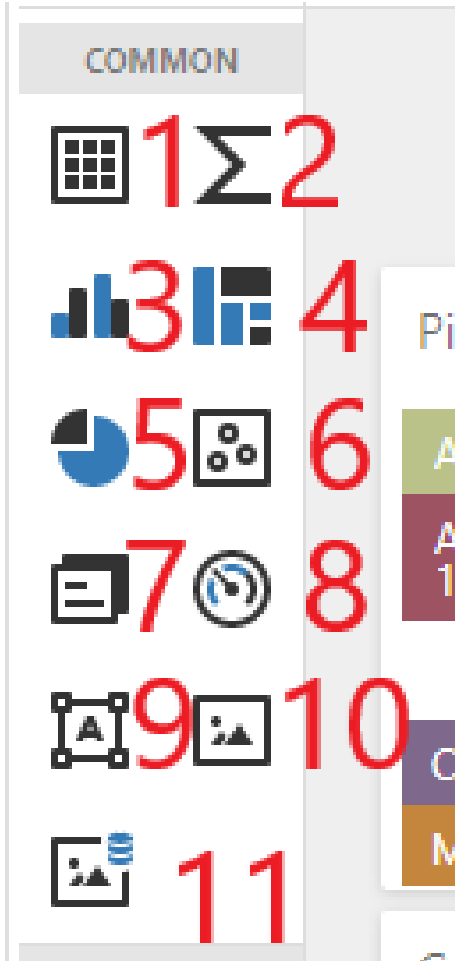
1. Switch to Viewer Mode button: Allows you to toggle between the Viewer Mode and Designer Mode.
2. Group: A dropdown allowing you to switch between Dashboard Groups.
3. Dashboard Tabs: The different dashboard types that are assigned within a particular Dashboard Group.
4. Dashboard Menu: A hamburger button that displays the Dashboard Menu. For more on this see [Dashboard Menu](#).
5. Undo button: Allows you to undo the last change made.
6. Redo button: Allows you to redo the any changes that were undone.
7. W (Width): Allows you to format the width of the dashboard either automatically to fit the screen or using a fixed width.
8. H (Height): Allows you to format the height of the dashboard either automatically to fit the screen or using a fixed width.
9. Common Display Types: Icons allowing you to select the way in which your data is displayed. For more on this see [Common Display Types](#).
10. Map Types: Icons allowing you to select the display format of your maps. For more, please see [Map Types](#).
11. [Dashboard Display]: The space where the dashboards will be created and displayed.
12. Filter Types: Icons allowing you to apply filters to the entire Dashboard tab.
13. Layout Options: Allows you to choose between the standard Tab Container layout, spreading the dashboard across the entire tab, or the Group layout, allowing you to create a panel and group dashboards together inside of it. Please see [Using the Layout Settings](#) for more.

Dashboard Menu



1. New...: Creates a new dashboard, before creating the dashboard you will have to give it a name and select the data source for the dashboard.
2. Open...: Allows you to open an existing dashboard to edit, this can be used as an alternative to moving between the dashboard tabs at the top of the designer.
3. Save: Allows you to save the work on the dashboard you are currently editing.
4. Data Sources: Allows you to view the current Data Sources that are being pulled upon to create your dashboards. Data Sources are preset lists of data pulled directly from your system. The different items in an assigned data set can be viewed from this screen, along with their standard format.
5. Title: Allows you to change the Title of your dashboard, which displays at the top of the Dashboard Display. You may also turn this feature off, change its alignment to Center or Left, choose whether a master filter should be included on the dashboard display and whether images should be embedded, linked or neither. See more on the Master Filter in [Using the Dashboard Display](#).
6. Currency: The type of currency that will be displayed throughout the dashboards.
7. Parameters:
8. Color Scheme: Allows you to set the color scheme of any graphs configured on the current dashboard. Colors are assigned per individual graph.

Common Display Types



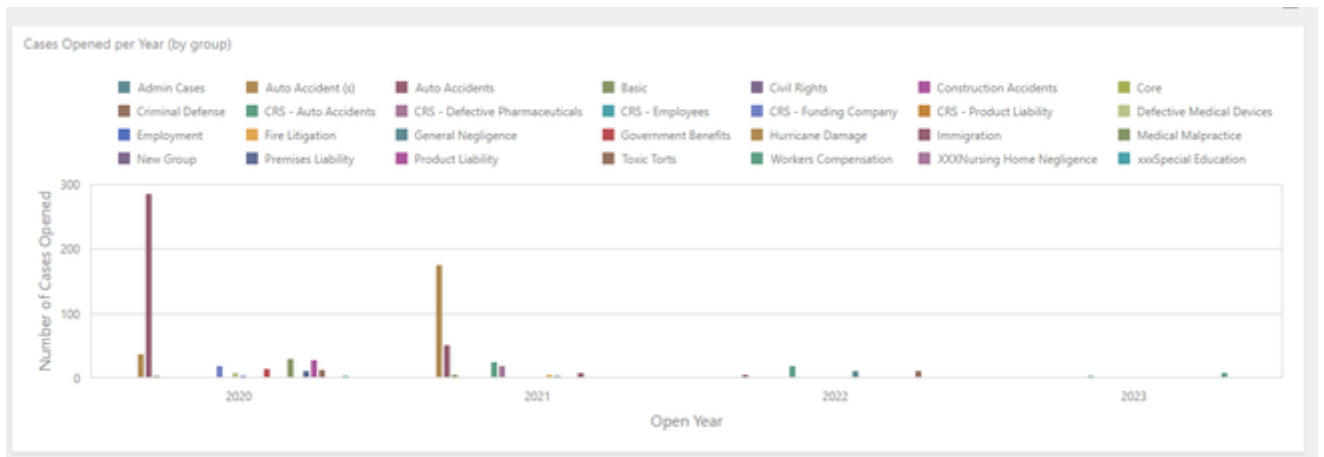
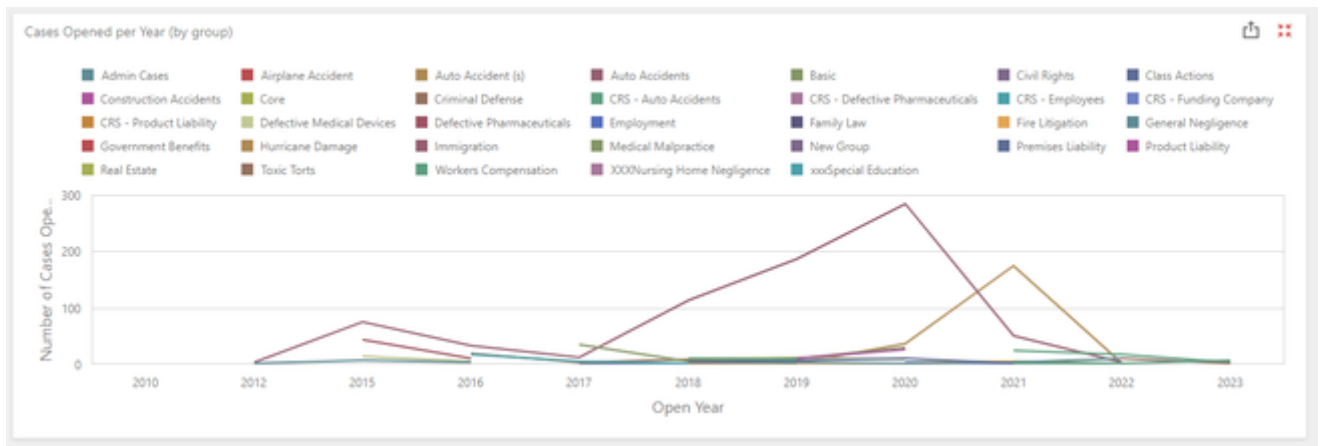
1. Grid: Creates a table containing the desired information.

| CaseNumber | Name | Stage | Status | Sub Status | Days L... | Group | Type | Sub Type | Of... |
|------------|---------------------------|----------------------|---------------------------------|-------------------------------|-----------|----------------|-------------------|---------------------|-------|
| AA190279 | White, Steve -v- Heat... | Work Comp Litigation | Active | | 115 | Auto Accide... | Auto Accident | Rear End | Fl... |
| AA190280 | Grimaldi, Angela -v- ... | No Stage | Discovery | LIT-5 Discovery ongoing | 1213 | Medical Ma... | Med Mal - Not... | Improper Treat... | N... |
| AA-220002 | Selizhuk, Igor -v- Doe... | Work Comp Litigation | Active | Presign- New Lead | 115 | Auto Accide... | Auto Accident ... | Intersection w/ ... | N... |
| CS1200305 | Jones, Kanron -v- Jon... | Settled | Case Settled 04 - Funds R... | | 966 | Medical Ma... | Med Mal-Not ... | Failure to Timel... | N... |
| CS160001 | Spikonivich, Margaret... | Settled | Case Settled - Periodic pa... | | 31 | Medical Ma... | Med Mal-Not ... | Failure to Timel... | N... |
| CS170047 | Chamberlain, Marjori... | 03 Litigation | LIT 2 - Summons & Compl... | | 115 | Medical Ma... | Med Mal - Not... | Failure to Timel... | N... |
| CS170171 | UNITED STATES OF A... | 03 Litigation | LIT 8 - Case on the Trial Ca... | | 115 | Criminal De... | Criminal Defen... | Sub Type Unkn... | N... |
| CS180070 | Robuck, George -v- ... | Settled | Case Settled 04 - Funds R... | Pre-Lit4 All Medical Recor... | 1725 | Auto Accide... | Auto-Not Mun... | Cross Over | N... |
| CS180081 | Spitz, Mary -v- NutriB... | Settled | Case Settled 04 - Funds R... | | 377 | CRS - Prod... | Nutribullet | | N... |
| CS180088 | Hinds, Mandy -v- Ra... | Settled | Case Settled 04 - Funds R... | | 9 | CRS - Auto ... | CRS - Auto Acc... | Cross Over | N... |

2. Pivot: Allows you to create a basic table that generates counts of the items within it.

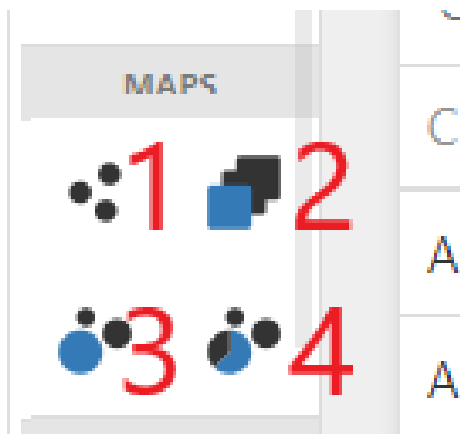
| Case Group Count by State | AK | AL | AZ | BC | CA | CO | CT | DC | FL | GA | IA | IL | KS | KY | LA | MA | MD | ME | MH | MO | MS | NARN | NC | NJ | NM | NV | NY | OH |
|---------------------------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|------|----|----|----|-----|----|----|
| Admin Cases | | | | | | | | | | | | | | | | | | | | | | | | | | | 2 | |
| Airplane Accident | | | | | | | | | | | | | | | | | | | | | | | | | 1 | | 1 | |
| Auto Accident (s) | | | | | | | | | 1 | 1 | | | | | | | | | | | | | 1 | | | 211 | 4 | |
| Auto Accidents | | 1 | 6 | 14 | 19 | 17 | | 2 | 82 | 33 | | 3 | | 3 | 2 | | | | | | 11 | | 44 | | | 464 | | |
| Basic | | | | | | | | | | | | | | | | | | | | | | | | | | | 14 | |
| Civil Rights | | | | | | | | | | | | | | | | | | | | | | | | | | | 1 | |
| Class Actions | | | | | | | | | | | | | | | | | | | | | | | | | | | 2 | |
| Construction Accidents | | | | | | | | | | | | | | | | | | | | | | | | | | | 2 | |

3. Chart: Allows you to create a variety of simple charts, such as bar charts or line charts depending on the view selected.

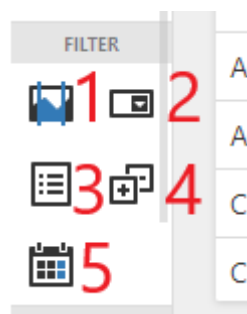


4. Treemap:
5. Pie:
6. Scatter Chart:
7. Card:
8. Gauges:
9. Text Box:
10. Image:
11. Bound Images:

Map Types



Filter Types



Using the Dashboard Display

Intake Performance Dashboard

The intake performance dashboard is a powerful tool that can be utilized to monitor the strength and performance of your intake staff as well as important data related to your incoming leads.

On this page, we will provide an in-depth breakdown of this important dashboard, column-by-column.

Dashboard Parameters/Filters

The screenshot shows the SmartAdvocate Intake Performance Dashboard. At the top, there are various filters and controls. The main table displays intake statistics for different case groups. The table has the following columns: Case Group, Inquiries, Wanted, Signups (W), Signed Up, Conversion (W), Overall Retention (W), True Signups, Referred Out, Chase Calls, and Avg. Time To Return (W). The data is grouped by Staff Member, with 'Whitely, Julia' selected. A red box highlights the filter controls at the top of the dashboard.

At the top of your screen the first thing that will need to be set are your filters/parameters as described below.

1. Date Range: The date range selected in this dashboard reflects the time period in which cases were opened. For example, if I wanted to see the statistics of all cases opened in October, 2022, I would set my date range from 10/1/22 to 10/31/22.
2. Case Type: This allows you to filter intake statistics by a specific case type.
3. Staff Type: This filter prompts you to select which type of staff member you would like to see associated with the lead. Keep in mind that the titles of these roles may vary based on changes made to your system, and may not say exactly the same thing as the list shown below. The options for this column are:
 - a. Case Creator: The staff member who created the case in Case Wizard.
 - b. Intake Paralegal: The staff member assigned as the Intake Paralegal during the intake process (or comparable role as set by your firm)
 - c. Investigator: The staff member assigned as the Investigator during the intake process (or comparable role as set by your firm)
 - d. Paralegal: The staff member assigned as the Paralegal during the intake process (or comparable role as set by your firm)
4. Signup Type: How the case was signed up.
5. Referred In: Whether the dashboard should include or exclude referred in cases, or if it should show both.
6. Office: The firm office the leads are assigned to.
7. Group By: There are two options which can be selected here, to group statistics either by Staff Member, to see performance on an individual level, or by Case Group, to view overall statistics for a group of cases.

Columns in this Dashboard

The screenshot shows the SmartAdvocate Intake Performance Dashboard with the 'Group By' filter set to 'Staff'. The table displays intake statistics for individual staff members. The table has the following columns: Staff, Inquiries, Wanted, Signups (W), Signed Up, Conversion (W), Overall Retention (W), True Signups, Referred Out, Chase Calls, and Avg. Time To Return (W). The data is grouped by Staff Member, with 'Admin, A.' selected. A red box highlights the filter controls at the top of the dashboard.

Once you have set your filters appropriately you can select the "Refresh Report" button and the data will be displayed in your report split into different columns as described below

1. Staff/Case Group: This column displays either the Staff Member or the Case Group, dependent on the selection made in Filter 6 above. For either selection there will be an arrow to the left side of the row, which, when selected, will display a breakdown of data for the opposite choice per row (e.g. if Staff Member was selected, the dropdown will give a breakdown of cases by Case Group for that staff member, and vice versa).
2. Inquiries: The number in this column indicates the number of leads that were entered as new cases into SmartAdvocate through any method, Case Wizard, API, etc.
3. Wanted: The number in this column indicates the number of wanted cases. To indicate a case as wanted it must have had a specific status applied to it. To customize these statuses for your firm please contact our support team. **Note: As of the 2023 release, these statuses will be customizable from System Parameters.**

4. Sign Up: This column displays the percentage of wanted cases out of your total inquiries (# of wanted divided by # of inquiries).
5. Signed Up: This column displays the number of cases of cases that have been open and marked as retained for more 90 days compared to the total number of retained cases (Cases Retained >90 days / Cases Retained).
6. Conversion: The percentage of wanted cases that were marked as retained (# of retained divided by # of wanted).
7. Overall Retained: The percentage of retained cases out of all inquiries (# of retained divided by # of inquiries).
8. True Signups: The number of cases that were marked as retained during the timeframe set in Filter 1, regardless of if they were opened during that timeframe.
9. Referred Out: The number of cases that were marked as accepted by a referred out firm compared to the total number of cases referred out.
10. Chase Calls: The number of wanted cases that have been marked as wanted for longer than 2 weeks without a retained date being added to the case.

My Cases Dashboard

Advertisement Campaigns Dashboard

The Advertisement Campaigns Dashboard allows you to monitor important statistics related to the performance of your different advertising campaigns running. For more information on setting up Advertising Campaigns please see [Advertisement Campaigns](#).

On this page, we will provide in-depth breakdown of this dashboard.

Dashboard Parameters

| From Date | To Date | Amount Spent | Total Fees | # of Calls | Cost Per Call | # Wanted | Cost Per Wanted | # of Retainers | Cost Per Retainer | # Cases With Fee | Avg. Fee | # Cases With No Fee |
|----------------------------------|---------|--------------|----------------|------------|---------------|----------|-----------------|----------------|-------------------|------------------|--------------|---------------------|
| > 1010-WINS | | \$100,014.00 | \$44,041.66 | 3 | \$33,338.00 | 2 | \$50,007.00 | 2 | \$50,007.00 | 2 | \$22,020.83 | |
| > 1-800-Get-Smart 1-877-438-7627 | | \$250,000.00 | \$116,666.66 | 4 | \$62,500.00 | 1 | \$250,000.00 | 1 | \$250,000.00 | 2 | \$58,333.33 | |
| > 1-800-LAWYERS | | \$250,000.00 | \$1,889,266.29 | 49 | \$5,102.04 | 24 | \$10,416.67 | 24 | \$10,416.67 | 14 | \$134,947.59 | |
| > Arvo | | \$100,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Bill Board | | \$51,000.00 | \$198,075.63 | 7 | \$7,285.71 | 6 | \$8,500.00 | 6 | \$8,500.00 | 4 | \$49,518.91 | |

1. From [Date]: Filters the campaigns which will appear in the dashboard by the beginning date of the Ad Campaign set up in the Advertisement Campaigns admin page.
2. To [Date]: Filters the campaigns which will appear in the dashboard by the end date of the Ad Campaign set up in the Advertisement Campaigns admin page.
3. Campaign: A dropdown allowing you to select which campaigns should be displayed in the dashboard.
4. Case Type: A dropdown allowing you to limit the Case Types which will appear in the dashboard. By default when this dropdown is left blank, it will show all Case Types in the system.
5. Office: A dropdown allowing you to limit the data that will appear in the dashboard to a specific office or offices of the firm. By default this is set to show all offices.
6. State: A dropdown allowing you to limit that that will appear in the dashboard to a specific state or states. By default when this dropdown is left blank, it will show data for all states.




Dashboard Columns

| From Date | To Date | Amount Spent | Total Fees | # of Calls | Cost Per Call | # Wanted | Cost Per Wanted | # of Retainers | Cost Per Retainer | # Cases With Fee | Avg. Fee | # Cases With No Fee |
|----------------------------------|---------|---------------------------------|----------------|------------|---------------|----------|-----------------|----------------|-------------------|------------------|--------------|---------------------|
| > 1010-WINS | | \$100,014.00 | \$44,041.66 | 3 | \$33,338.00 | 2 | \$50,007.00 | 2 | \$50,007.00 | 2 | \$22,020.83 | |
| > 1-800-Get-Smart 1-877-438-7627 | | \$250,000.00 | \$116,666.66 | 4 | \$62,500.00 | 1 | \$250,000.00 | 1 | \$250,000.00 | 2 | \$58,333.33 | |
| > 1-800-LAWYERS | | \$250,000.00 | \$1,889,266.29 | 49 | \$5,102.04 | 24 | \$10,416.67 | 24 | \$10,416.67 | 14 | \$134,947.59 | |
| > Arvo | | \$100,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Bill Board | | \$51,000.00 | \$198,075.63 | 7 | \$7,285.71 | 6 | \$8,500.00 | 6 | \$8,500.00 | 4 | \$49,518.91 | |
| > Bus Ad - 108th Street | | \$50,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Caribbean News | | \$100,000.00 | \$0.00 | 2 | \$50,000.00 | 0 | \$0.00 | 0 | \$0.00 | 1 | \$0.00 | |
| > Caribbean Voice LLC | | \$250,000.00 | \$0.00 | 2 | \$125,000.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Carlsbad Daily | | \$100,000.00 | \$0.00 | 1 | \$100,000.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > CBS 2 - Boston | | \$100,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > CBS Channel 5 | | \$100,000.00 | \$333,333.33 | 3 | \$33,333.33 | 3 | \$33,333.33 | 3 | \$33,333.33 | 2 | \$166,666.67 | |
| > Facebook - Legal | | \$10,000.00 | \$0.00 | 2 | \$5,000.00 | 1 | \$10,000.00 | 1 | \$10,000.00 | 2 | \$0.00 | |
| > Florida Turnpike Bill Board | | \$10,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > HD Advertising | | \$18,250.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Melville Social Media | | \$100,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > NBC - Channel 4 NYC | | \$1,000,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > New Mexico TV 1 | | \$100,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > New 12 Westchester | | \$150,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > News Radio 880 | | \$50,000.00 | \$0.00 | 1 | \$50,000.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Newspaper - NY Times | | \$75,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Poughkeepsie Journal | | \$10,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| > Reggae 24/7 | | \$150,000.00 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | 0 | \$0.00 | |
| Total Spent: \$3,234,264.00 | | Grand Total Fee: \$2,718,193.81 | | 81 | | 42 | | 42 | | 33 | | 18 |

1. [Blank Column]: Contains an arrow that when selected shows a breakdown of the same statistics listed below for each campaign with that Advertiser during the selected time period.
2. From Date: Only contains data when the arrow next to the Advertiser has been selected. Shows the start date of any campaigns run with that advertiser for the selected time period.
3. To Date: Only contains data when the arrow next to the Advertiser has been selected. Shows the end date of any campaigns run with that advertiser for the selected time period.
4. Amount Spent: The total amount spent with that advertiser for the selected time period.
5. Total Fees: The total fees recorded for cases that were brought in by that advertiser for the selected time period.
6. # of Calls: The total number of leads that were entered into the system with that advertiser assigned as a referral source.

7. Cost Per Call: The average cost per call from that advertiser. (Amount Spent / # of Calls)
8. # Wanted: The number of cases that were marked as wanted/viable leads with that advertiser assigned as a referral source.
9. Cost per Wanted: The average cost per wanted case from that advertiser. (Amount Spent / # Wanted)
10. # of Retainers: The number of cases that were actually signed (and marked as retained in the SmartAdvocate system) with that advertiser assigned as a referral source.
11. Cost per Retainer: The average cost per retained case from that advertise. (Amount Spent / # of Retainers)
12. # of Cases With Fee: The number of cases with that advertiser assigned as a referral source that have a fee recorded in their Negotiations /Settlement screen.
13. Avg. Fee: The average fee brought in by cases with that advertiser assigned as a referral source.
14. # Cases With No Fee: The number of retained cases with that advertiser assigned as a referral source that have not had a fee entered on their Negotiations/Settlement screen.
15. Total Spent: The sum of all amounts in the Amount Spent column for all advertisers running campaigns in the selected time period.
16. Grand Total Fee: The sum of all amounts in the Total Fees column for all advertisers running campaigns in the selected time period.
17. Calls: The sum of all calls in the # of Calls column for all advertisers running campaigns in the selected time period.
18. Wanted: The sum of all cases in the # Wanted column for all advertisers running campaigns in the selected time period.
19. Retainers: The sum of all cases in the # of Retained column for all advertisers running campaigns in the selected time period.
20. Fee Cases: The total number of cases that have a fee recorded on their Negotiations/Settlements screen for all advertisers running campaigns in the selected time period.
21. No Fee Cases: The total number of cases that do not have a fee recorded on their Negotiations/Settlements screen for all advertisers running campaigns in the selected time period.

Note: Any numbers that appear blue in color on this screen are hyperlinks that will provide a breakdown of all of the cases meeting the criteria of being in that column.

Case Information Export   

| Case # | Case Name | Opened Date | Case Type | Status | # of Days in Statu |
|----------|--|-------------|-------------------------|--|--------------------|
| MD230067 | Beasley, Pam -v- Scott, Mike | 3/27/2023 | MND - Auto Accident | Pre-Lit 01- PI New Case - Initial Letters to be Sent | 0 |
| TC220209 | Rose, John -v- Guinness, Alec | 12/6/2021 | Auto Accident | Pre-Lit 03.5 - PI All Medical Records Received | 42 |
| MD220097 | Rose, Moira -v- Home Depot, | 4/15/2022 | Workers Comp Negligence | Presign- New Lead | 316 |
| MD220092 | Rose, John -v- Admin, A. | 4/11/2022 | Labor Law | Presign- New Lead | 142 |
| MD220022 | Rose, John -v- Aearo Technologies LLC, | 1/31/2022 | 3M Earplugs | Case Settled 03 - Signed Releases Sent - Waiting for Check - Negotiating Liens | 78 |
| MD220013 | Scott, Michael -v- Doe, John | 1/14/2022 | Auto Accident | Closed Case | 141 |
| MD210411 | Rose, John -v- Moore, Philip | 12/6/2021 | Auto - Municipal | LIT 4 - Discovery | 27 |

Page 1 of 1 (7 items) < 1 >

CLOSE

Office Calendar

The Office Calendar contains all the information about appointments, tasks, and critical deadlines in all cases, in addition to appointments not connected to any particular case. The office calendar is virtually identical in appearance and function to the [Case Calendar](#), but all events may appear in the calendar, and appointments added from this page will not be connected to any case.

See the general [Calendar](#) chapter of the manual for a full description of the functionality of the SmartAdvocate calendar (both for specific cases and for the office generally).

One difference between the case calendar and the office calendar not mentioned in the Calendar chapter: by default, when opening the office calendar, the selected date range will only cover the current date, unless you have set a default favorite calendar filter with a different date range. The Case Calendar, but default, will cover a date range from the date the case was opened through a date approximately ten years from the current date, unless you have set a default favorite calendar filter with a different date range.

Continue on for [a complete overview of Calendars](#) in SmartAdvocate.

Read more about [Task Templates](#), it will lead you to Text Message Templates and Task Groups.

Read more about [WorkPlans](#).

Tools

Accounting

This page is currently under construction. Check back for updates!

Check Requests for Review

Distribution Checks for Review

Check Requests for Review

This page is under construction. Please check back for updates.

Integrations

In order to provide additional functionality and the best possible user experience, SmartAdvocate integrates with various third-party software and vendors. SmartAdvocate constantly works with these vendors to update these integrations and, in response to customer requests, create additional integrations. The Integrations option under Tools will list any integrations that have been added to your SmartAdvocate. Please contact us at sales@smartadvocate.com for information about the most current integrations available.

Callers Info

This page is currently under construction. Check back for updates!

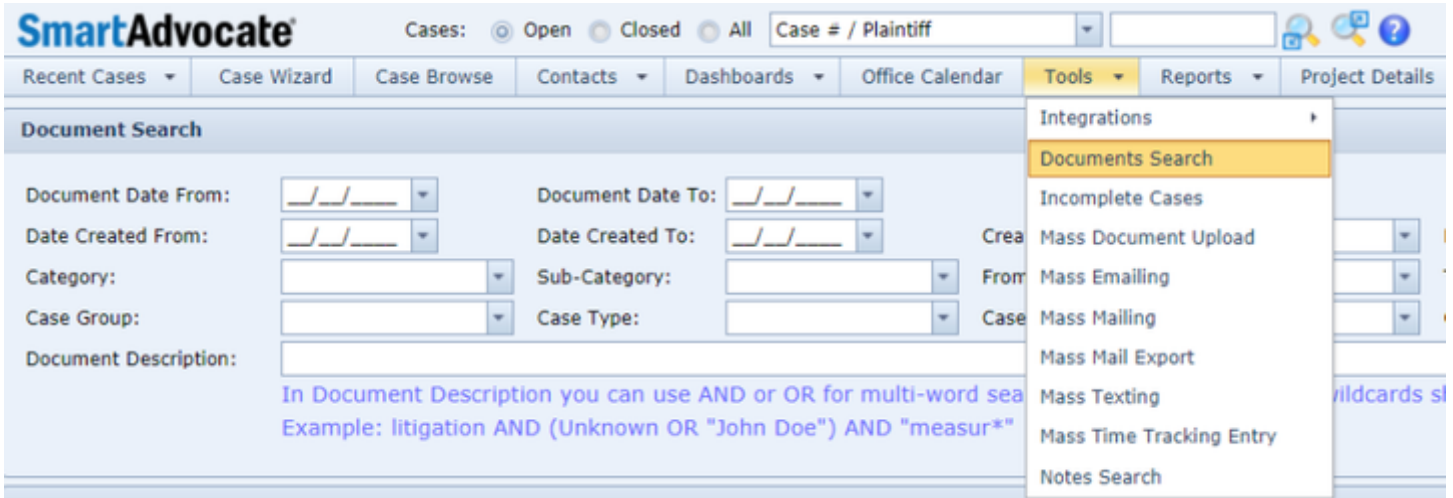
Case Intake Data

This page is currently under construction. Check back for updates!

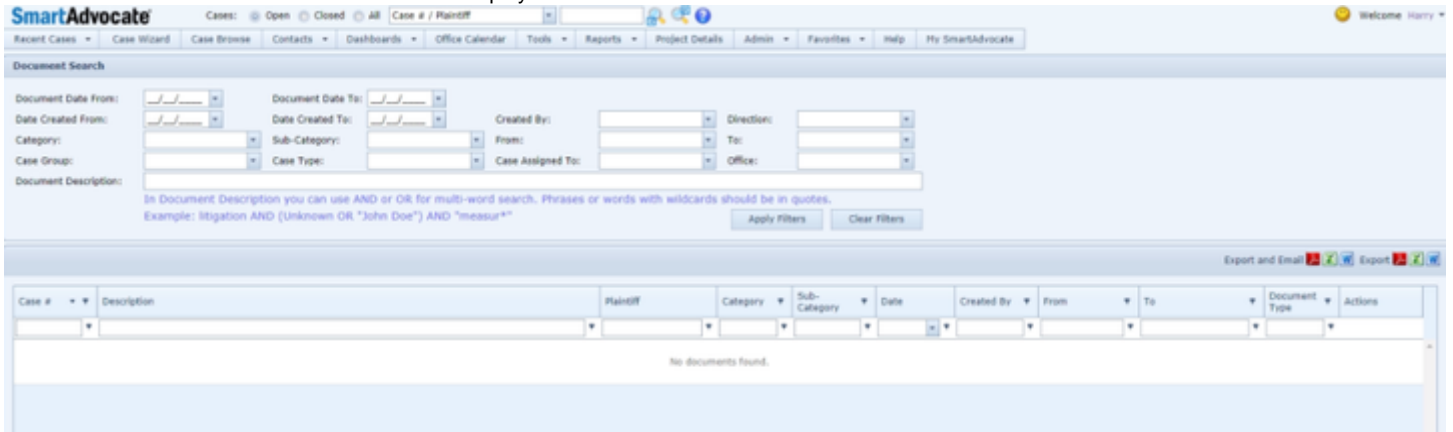
Document Search

SmartAdvocate® allows you to do a global, system wide search to locate a document wherever it is located within the system. There are instances, for example, when you know you have created a specific document, but may not remember which file the document was created in or attached to or when that document was created. The "Documents Search" feature under the "Tools" section will allow you to do a global search to locate the document.

1. Choose "Tools" from the top task bar
2. Then choose "Documents Search" from the drop down list of menu items



The "Document Search" selection screen will be displayed



1. You may limit your search to specific dates if you wish, or simply leave the "Date From" and "Date To" fields blank.
2. You have the option of limiting your search to specific categories and sub-categories and Case Types, as well as such other search criteria as who the document was created by or from, who it was directed to, etc.
3. Enter a description (i.e., the document description that would have been used when the document was being saved).
4. Click the "Apply Filters" button to execute the search.

If there are documents in the system that satisfy your search criteria, a list of cases will be displayed. In the example below, the search term used was "medical records" and implant (1) which resulted in the list displayed (2).

Document Search

Document Date From: [] Document Date To: []
 Date Created From: [] Date Created To: [] Created By: [] Direction: []
 Category: [] Sub-Category: [] From: [] To: []
 Case From: [] Case Assigned To: [] Office: []

Document Description: "medical records" and implant
In Document Description you can use AND or OR for multi-word search. Phrases or words with wildcards should be in quotes.
 Example: ingestion AND (unknown OR "John Doe") AND "measur**"

Apply Filters Clear Filters

| Case # | Description | Plaintiff | Category | Sub-Category | Date | Created By | From | To | Document Type | Actions |
|--------|--|---------------------|----------|--------------|----------|---------------|-------------------|--|---------------|-------------|
| 6087 | Auto-generated letter for medical request.Medical Records Request - Hospital - Abstract Record - Implant | Khotka, Don L., EMT | Medical | Letter | 5/3/2017 | Krasnov, Yana | SmartAdvocate LLC | Zufall Health Center/Amy R. Salerno,MD | Document | [] [] [] |
| 6087 | Auto-generated letter for medical request.Medical Records Request - Hospital - Abstract Record - Implant | Khotka, Don L., EMT | Medical | Letter | 5/3/2017 | Krasnov, Yana | SmartAdvocate LLC | Zufall Health Center/Amy R. Salerno,MD | Document | [] [] [] |
| 6087 | Auto-generated letter for medical request.Medical Records Request - Hospital - Abstract Record - Implant | Khotka, Don L., EMT | Medical | Letter | 5/3/2017 | Krasnov, Yana | SmartAdvocate LLC | Zufall Health Center/Amy R. Salerno,MD | Document | [] [] [] |
| 6087 | Auto-generated letter for medical request.Medical Records Request - Hospital - Abstract Record - Implant | Khotka, Don L., EMT | Medical | Letter | 5/3/2017 | Krasnov, Yana | SmartAdvocate LLC | Zufall Health | Document | [] [] [] |

Copy of Make use of the Documents and Notes Search features in SmartAdvocate

Incomplete Cases

There may be instances where you are not able to generate a case even though some of the intake information was entered in Case Wizard. SmartAdvocate® will keep the information that was entered (even though a new case may not have been generated) and allow the completion of the required information at a later date without having to reenter the information already input.

1. Select "Tools" from the Top Tool Bar.
2. Select "Incomplete Cases".
3. Select the incomplete case you want to work on by double clicking on the row, right clicking on the row and choosing Open in Case Wizard, or clicking on the right-click icon to the right of the row.

You will be taken to Case Wizard to complete any missing information for the specific case.

SmartAdvocate

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools Reports Project Details Admin Favorites Help My SmartAdvocate

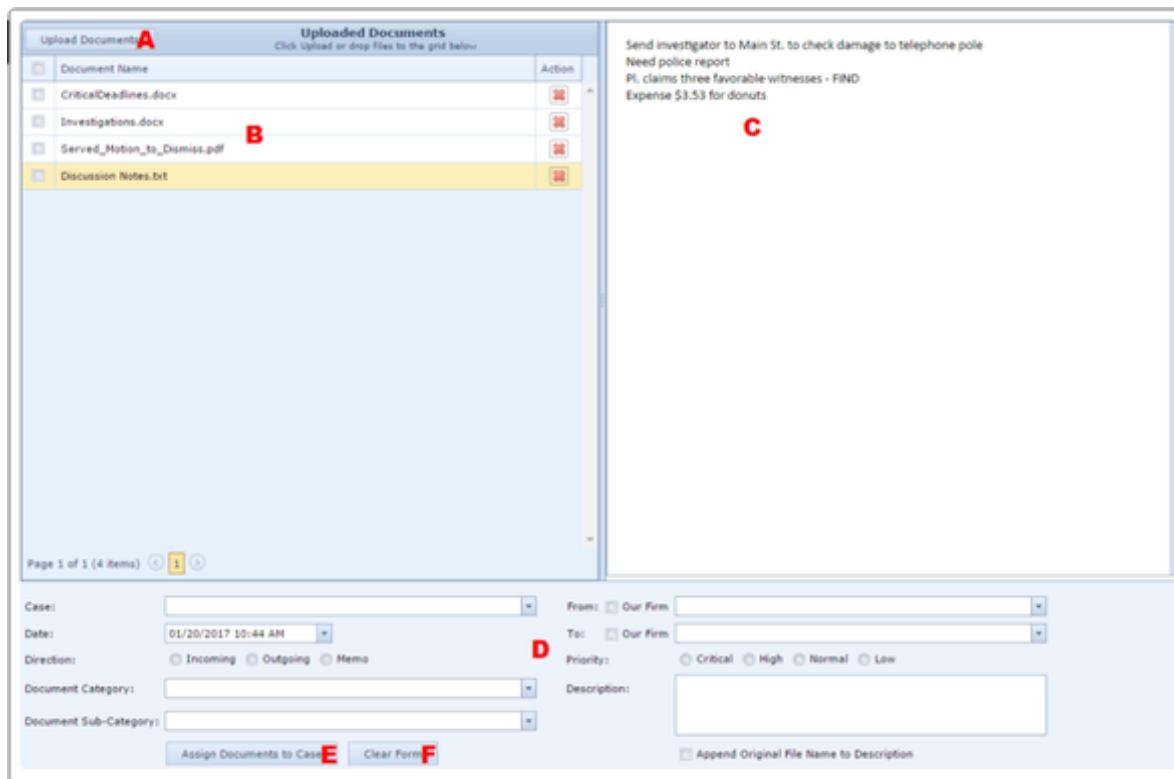
Incomplete Cases

| Case Group | Case Type | Plaintiffs | Created By | Creation Date |
|----------------|---|-------------------|----------------|------------------------|
| Auto Accidents | Auto-Port Authority & City | | Cicali, Joseph | 1/8/2018 4:08:17 PM |
| Auto Accidents | Auto-Not Hun-Not Death - Extensive Intake | | Dniel, Harry | 1/8/2018 12:44:13 PM |
| Auto Accidents | Auto-Not Hun-Not Death - Extensive Intake | | Dniel, Harry | 1/5/2018 9:32:07 AM |
| Auto Accidents | Auto Accident | | Cicali, Joseph | 1/4/2018 10:45:52 AM |
| Auto Accidents | Auto Accident | Smith, Alberto R. | Admin, A. | 12/26/2017 12:06:09 PM |
| Auto Accidents | Auto Accident | Selchuk, Igor | Selchuk, Igor | 12/27/2017 4:28:24 PM |
| Auto Accidents | Auto Accident | Selchuk, Igor | Selchuk, Igor | 12/27/2017 4:23:47 PM |
| Auto Accidents | Auto Accident | Selchuk, Igor | Selchuk, Igor | 12/27/2017 4:23:33 PM |
| Auto Accidents | Auto Accident | | Admin, A. | 12/26/2017 9:14:07 AM |
| Auto Accidents | Auto-Municipal-Not Death | cicali, Joseph | Cicali, Joseph | 12/21/2017 2:28:46 PM |
| Auto Accidents | Auto-Municipal-Not Death | cicali, Joseph | Cicali, Joseph | 12/21/2017 2:20:41 PM |

Mass Document Upload

The Mass Document Upload tool allows you to quickly assign a large number of electronic documents to cases. This is especially efficient if you have received a CD or thumb drive containing various files pertaining to a single case. It can also be useful if you receive files of the same type that each pertain to different cases (possibly a set of Affidavits of Service from a process server, or deposition transcripts from a court reporter).

The Structure of This Page



1. Upload Documents button. Opens a file-browsing window so you can select documents to upload.
2. Uploaded Documents table. Contains the list of documents that have been uploaded but not yet assigned to cases.
3. Preview pane. Displays a preview of the selected document.
4. Document classification fields. Used to describe the attributes of the documents being assigned, such as the case to which they are being assigned, document category, from whom the documents came, etc. All documents being assigned simultaneously must share the same attributes. If some of the documents to be uploaded have different attributes, you will be required to perform the upload process separately for each attribute set.
5. Assign Documents to Case button. Files the documents selected in the Uploaded Documents table in the case selected in the document classification fields.
6. Clear Form button. Used to reset the document classification fields.

Using This Tool

To use the Mass Document Upload tool to assign documents to cases:

1. Click the Upload Documents button. This will bring up a window allowing you to browse for the files you wish to upload.
 - The window that opens will be part of your operating system, not SmartAdvocate, so different users may have different interfaces. Consult your operating system help files if you have problems at this point.
2. Find the documents you wish to upload in your computer's file system.
3. On most systems, you should be able to select multiple files within the same folder by holding the Ctrl button and clicking each file you wish to include. Or, if all the files in a folder should be selected, you can click the top file in the folder, hold Shift, and click the bottom file in the folder, which will select all the files in that folder. If you cannot select all of the files you want, select as many as you can (possibly just one); you will be able to repeat this step to upload the rest of the files.
4. When the files you wish to upload are all selected, click the Open button in the lower right of the window. The files will be uploaded to SmartAdvocate, and their filenames will appear as rows in the Uploaded Documents table.
 - If you were unable to select all of the files you wished to upload, repeat steps 1-4 until all of the desired files have been added to the Uploaded Documents table.
5. Using the Checkbox selector column in the Uploaded Documents table, select the first group of documents to upload.
 - When uploading a group, every file in the group will have nearly identical properties, including the category and sub-category. Documents of entirely different categories should not be selected as part of the same group, even if they belong to the same case.
6. Fill out the document classification fields. See Document Classification Fields for more details.
7. Click the Assign Documents to Case button below the fields. The selected documents will be removed from the Uploaded Documents list and filed in the selected case.
 - The document classification fields will not reset. This allows you to make only a few changes if you have a set of documents that share most of their properties except, for instance, their category and subcategory, or their description. If you do want to reset the classification fields, click the Clear Form button below the fields.
8. Repeat steps 5-7 until all of the documents have been assigned and the Uploaded Documents table is empty.

Preview Pane

This area allows you to view the contents of a document before it is uploaded. Clicking any row of the Uploaded Documents table will cause that document to appear in the Preview Pane, if possible. (It will also shade the corresponding row of the table yellow.) You can change the relative size of the preview pane and the Uploaded Documents table by dragging the border between them to a point of your choosing. Most files will be visible in the preview pane, but not all file extensions are supported. Additionally, different file types are handled slightly differently by the preview pane. The pane is mainly useful in ensuring that you don't lose track of which filename in the Uploaded Documents table corresponds to which document.

Document Classification Fields

The document classification fields allow you to fill in the details of a set of documents. The fields are as follows:

The screenshot shows a form for document classification. It includes the following fields and controls:

- A:** Case: Dropdown menu.
- B:** Date: Date-time widget dropdown showing 01/20/2017 10:44 AM.
- C:** Direction: Radio buttons for Incoming, Outgoing, and Memo.
- D:** Document Category: Dropdown menu.
- E:** Document Sub-Category: Dropdown menu.
- F:** From: Dropdown menu with an "Our Firm" checkbox.
- G:** To: Dropdown menu with an "Our Firm" checkbox.
- H:** Priority: Radio buttons for Critical, High, Normal, and Low.
- I:** Description: Text input field.
- J:** Append Original File Name to Description: Checkbox.

Buttons for "Assign Documents to Case" and "Clear Form" are located at the bottom left.

1. Case: Dropdown; the case to which to assign the documents. All cases in the SmartAdvocate system can be searched for by typing part of the case number or name in the field; however, when there is no text in the field, only the twenty most recently visited cases appear in the dropdown.
2. Date: Date-widget dropdown; the date and time the documents were added to the case.
3. Direction: Radio button; whether the document was sent from the firm, to the firm, or within the firm. Choose among Incoming, Outgoing, or Memo.
4. Document Category: Dropdown; choose the category of the document.
5. Document Sub-Category: Dropdown; choose the subcategory of the document.
6. From: Dropdown; choose the contact that sent the document. Selecting the Our Firm checkbox next to this field will automatically set this field to the name of your firm.
7. To: Dropdown; choose the contact that received the document. Selecting the Our Firm checkbox next to this field will automatically set this field to the name of your firm.
8. Priority: Radio button; sets the priority level of the document. Choose among Critical, High, Normal, or Low.
9. Description: Text input; the description of the document.
10. Append Original File Name to Description: Checkbox; whether the description field of the resulting documents should have the filename of the original file added to the end, to distinguish the documents.

Document Persistence and Deleting an Uploaded Document

Documents that have been added to the Uploaded Documents table but not assigned to a case will remain in the table, even if you leave the Mass Document Upload page and return later. If you decide that an uploaded document should not be assigned to any case, and should be deleted from the table, you can delete it by clicking the [Delete icon](#) in that document's row in the Uploaded Document table. A confirmation message will appear; click the OK button in the message to confirm the deletion. Clicking on delete does not delete the file from its original location; it merely removes the document from the Uploaded Documents table.

Mass Emailing

The Mass Emailing tool allows you to quickly send an email to multiple clients in different cases. Because this tool allows the use of email templates and a limited selection of merge codes, you can efficiently send the same email to a large number of clients, personalized to each client and their case.

The Structure of This Page

The screenshot shows the Mass Emailing tool interface. It includes the following components:

- A:** Case Number entry field.
- B:** Case contacts selection area with radio buttons for Primary Plaintiff, Primary Contact, Primary Plaintiff and Primary Contact, and All.
- C:** Send button and options for "Send a copy to me", "Send a blind copy to me", and "Save a copy in notes".
- D:** Send button.

The main area displays a table with columns for Case #, Case Name, Plaintiff Name, Plaintiff Role, and Plaintiff Email. Below the table is a "Create Email" section with a subject line and an attachments browser. A rich text editor is used for the email content.

1. Case Number entry. Used to select the cases whose plaintiffs will receive the email.
2. Case contacts selection. Used to select which plaintiffs in the cases will receive the email.
3. Email settings. Includes various miscellaneous options for sending and saving the email, including choosing a template upon which the email will be based.
4. Send button. Sends the email.
5. Plaintiffs table. Lists the plaintiffs selected to receive the email and allows you to individually deselect plaintiffs and preview the personalized email to be sent to a particular plaintiff.
6. Email content. Contains the text of the email and allows attachments to be added.

Using This Tool

To use the Mass Emailing tool to send an email to multiple plaintiffs:

1. Type the list of cases that have plaintiffs to whom the email will be sent into the Case Number entry field and click the Show Results button. Case numbers must be separated by either a comma or a semicolon, or be on different lines.
 - If you have reached this page by using the Mass Update feature in Case Browse, the list will already be entered in the field for you.
2. By default, the email will be sent to the primary plaintiffs in the selected cases. To change this behavior, click a different **Radio button** in the case contacts selection area. You can send the email to the primary contacts, the primary plaintiffs and the primary contacts (this will not send duplicate emails to plaintiffs marked as both), or to every plaintiff in the selected cases.
3. Make any desired changes to the fields in the email settings area. If you wish to use an existing email template, select it from the Template field. (Visit the [Email/Note Templates](#) administrative page to view your existing email templates.) If you wish to use an existing email signature, select it from the Signature field. If you wish to CC or BCC yourself on the email, or save a copy of the email in Notes, select the appropriate checkbox(s). If you wish to change the importance setting of the sent email, select the correct setting from the Importance field.
4. Make any further changes to the text of the email you wish. You can edit the subject and the body, and you can attach any files from your computer you wish. (You cannot attach documents from within SmartAdvocate, because those are specific to cases. If you wish to attach a document that is in a case, you will need to save a copy of that document to your computer first.) You may include merge codes when manually editing the email, but there is no automatic merge code selection button in this tool; if you are creating an email that requires adding merge codes, it is probably more appropriate to first save it as an email template, and then simply select that template in this tool.
5. If you wish to exclude any of the listed plaintiffs from receiving the email, do so by deselecting the Checkbox selector in that plaintiff's row.
6. If you are satisfied with the selection of plaintiffs and the content of the email, send the email by clicking the Send button.

Mass Mailing

The Mass Mailing tool allows you to quickly generate documents from a single template for plaintiffs in multiple cases, to facilitate a mass mailing. This tool cannot actually perform the mailing for you; you will need to print the generated documents and mail them yourself. However, the tool can also be used to make printing address labels or envelopes more efficient and convenient, which will also expedite the physical mailing process.

The Structure of This Page

1. Case Number entry. Used to enter the cases in which the documents will be generated.
2. Case contacts selection. Used to select the plaintiffs for whom the documents will be generated and, if appropriate, to exclude those plaintiffs who are on the Prevent Mailing list or are deceased, incompetent, or an infant.
3. Template selector. Used to select, analyze, and generate the template for the selected plaintiffs.
4. Plaintiffs table. Lists the plaintiffs for whom the document will be generated.

Using This Tool

To use the Mass Mailing tool to generate multiple documents:

1. Type in the Case Number entry field the list of cases that have plaintiffs to whom you wish to send the email and click the Show Results button. Case numbers must be separated by either a comma or a semicolon or be on different lines.
 - If you have reached this page by using the Mass Update feature in Case Browse, the list will already be entered in the field for you.
2. By default, the document will be generated for the primary plaintiffs in the selected cases. If you wish to change this behavior, click a different **Radio button** in the case contacts selection area. You can generate the document for the primary contacts, the primary plaintiffs and the primary contacts (this will not send duplicate emails to plaintiffs marked as both), or to every plaintiff in the selected cases. You can also choose to exclude plaintiffs with the Prevent Mailing field selected in their **Contact Card**, or with Deceased, Incompetent, or Infant selected in the Sub Category field in their Contact Card, by selecting the appropriate checkbox in the case contacts selection area. (If there is a plaintiff that is an organization, that plaintiff will be excluded unless both checkboxes are deselected.)
3. Select the template you wish to generate. You can narrow down the selection of templates by first selecting a template group from the Select Template Group field, or you can skip that step, in which case you will be selecting the template from the entire list of document templates. In either case, select the appropriate template from the Select Template field.
4. If you wish to make sure the template will fully generate for all plaintiffs, click the Analyze button in the template selector area. This will bring up a panel containing a list of merge codes that cannot be converted by the Mass Mailing tool into the intended information; any such codes will remain as-is in the generated documents. The panel will also list, for each individual case, merge codes that will be converted into nothing, generally because that data is absent in the SmartAdvocate system. (This is not necessarily an error or a problem; merge codes that draw from, for example, the third line of an address will commonly be converted into nothing, because few addresses have three lines.) Note that if merge codes that would normally require a choice by the user are included in the selected template, their replacements in the generated documents may be unpredictable. The panel does not note this potential issue, so keep it in mind when selecting and generating a template and, if you use such a document, be certain to check each document to insure the information was entered into the documents properly.
5. If you are satisfied with the selection of plaintiffs and the content of the document, generate the documents by clicking the Generate button. You will have the option to open or download a single document containing each of the generated documents in sequence; regardless of whether you choose to do so, the individual generated documents will be available in the [Documents](#) page of their respective cases.

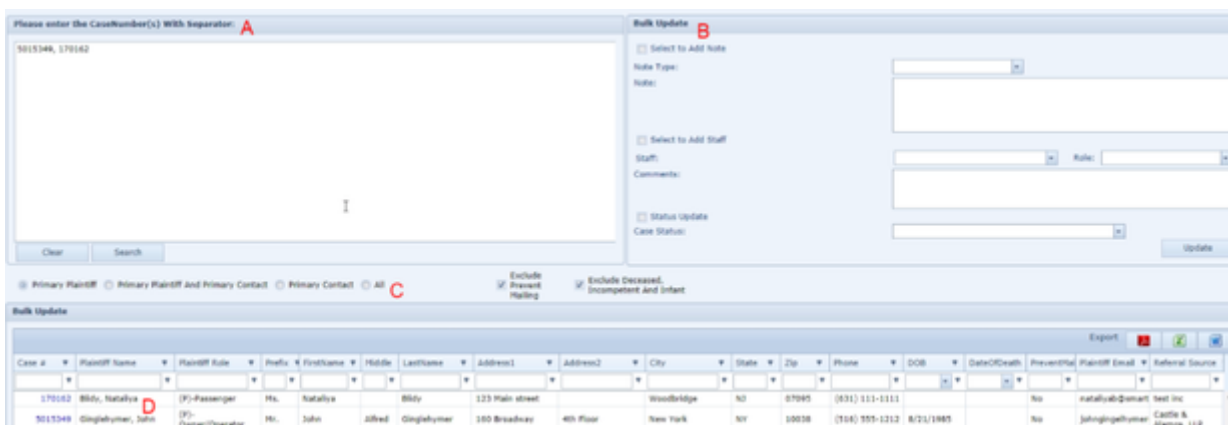
The Mass Mailing tool can be used as part of the process of generating a set of address labels for all of your clients (or a subset of your clients, based on the case type or case status or some other criteria). This process also involves the Case Browse feature and Microsoft Word. To generate the address labels:

1. Search in Case Browse for the cases whose clients you want to create labels for. See the [Search Criteria](#) page for setting the search criteria to find your desired group of cases.
2. On the Case Browse [Search Results](#) page, click the checkbox in the heading of the Checkbox selector column at the left of the table of results. This will select the checkbox in that column for every row in the table. Uncheck any rows that you do not wish to include.
3. Click the Mass Update button to the upper left of the table, which will open a list of options. Click Generate Document to open the Mass Mailing tool with the case numbers of every checked case in the search results automatically added to the Case Number entry field.
4. As with the usual use of this tool, change the selections in the case contacts selection fields if you want plaintiffs other than the primary plaintiffs to be included in the list, or if you want to include plaintiffs with the Prevent Mailing attribute, with a Sub Category other than Adult, and/or organization plaintiffs.
5. When you are satisfied with the list of plaintiffs in the table, click the Excel icon to export the table to an Excel spreadsheet. Remember the name and location of the exported file.
6. Open Microsoft Word and select the Mailings tab. Click the Start Mail Merge button, which will open a list of options, and then click the Step By Step Mail Merge Wizard option. This will open a panel in Word for the Mail Merge Wizard.
7. In the Wizard, select Labels and then click the Next button at the bottom of the Wizard.
8. In the Wizard, select Change document layout and then click the Label options text. This will open a menu in Word allowing you to select the label type.
9. Find and select the brand and type of your labels (most likely Avery US Letter) in the Label vendors dropdown, then find and select the product number of the labels in the Product number field. Click OK in the menu, then click the Next button at the bottom of the Wizard.
 - The numbers are listed alphabetically instead of numerically, so, for example, 11101 will be listed before 5490. Do not be concerned if, at first, it looks like your product number will not be in the list; it most likely will be.
10. In the Wizard, click Next: Select recipients, select Use an existing list and then click the Browse button. Find and select the Excel file you exported earlier, then click Open. If a menu opens asking you to Select Table, select Sheet\$ (which will probably already be selected) and then click OK. This will open another menu with a list of your selected clients; click OK to close that menu, and then click the Next button at the bottom of the Wizard.
11. Click Next: Arrange your labels, then click the Address block text in the Wizard. This will bring up a menu with options for formatting the name and address that will appear on the label. Most likely, you can simply click OK in this menu to accept the default, but if you prefer a different format, you may select a different option from the list of recipient name formats, and then click OK. Click the Update all labels button in the Wizard to ensure that every label contains the selected address format, and then click the Next button at the bottom of the Wizard.
12. You will see the first page of your labels. Although there is only one page in the document, Word has created the full list of labels; this first page is just a preview. Click the Next button at the bottom of the Wizard to move to the last step.
13. You may either print the labels directly from the Wizard without saving them, or open the full set of labels as a separate Word document, allowing you to save the file, and then print the labels from that document. If you do not wish to save the labels, click the Print button, make sure that All is selected, then click OK. If you wish to save the labels first, click the Edit individual labels button, make sure that All is selected, then click OK. A new document will be opened with all of your labels. You may now save this document, and print it, as with any other Word document.

Mass Mailing Export

The Mass Mail Export tool allows you to change the status of, or add a note or a staff member to, a group of cases simultaneously. It can also be used to export a list of client addresses to create address labels or for other uses. This tool has become mostly redundant; the [Mass Mailing](#) tool and the Mass Update function in Case Browse can now be used more conveniently for each of the functions available on this page. However, this tool does allow you to perform more than one of these functions simultaneously.

The Structure of This Page



1. Case Number entry. Used to select the cases that will be simultaneously updated.
2. Bulk Update options. Used to determine the changes that will be applied to the selected cases.
3. Case contacts selection. Used to select which plaintiffs in the cases are displayed in the table.
4. Plaintiffs table. Lists the plaintiffs in the selected cases for exporting to various file types.

Using This Tool

To use the Mass Mail Export tool to make changes to a group of cases simultaneously:

1. Type the list of cases that have plaintiffs you wish to send the email to into the Case Number entry field and click the Search button. Case numbers must be separated by either a comma or a semicolon, or be on different lines.

2. If you wish to add a note to each of the cases, select the Select to Add Note checkbox, select the note type from the Note Type dropdown, and fill out the note text.
3. If you wish to add a staff member to each of the cases, select the Select to Add Staff checkbox, select the staff member from the Staff dropdown and the case role in which you wish to add them from the Role dropdown, and optionally add any comments about the addition in the Comments field.
4. If you wish to change each of the cases to the same new status, select the Status Update checkbox, then select the desired status from the Case Status dropdown.
5. Once you have set up all of the changes you wish to implement on the group of cases, click the Update button to make the changes. The Case Number entry field and the checkboxes and text input fields in the Bulk Update options will be reset to blank, and the changes will be applied to the cases.

Mass Texting

The Mass Texting tool allows you to quickly send a text message to plaintiffs in multiple cases. This requires an integration that provides text messaging services. (See Integrations for details.) This can be useful for quickly checking in with clients or offering a brief message such as a holiday greeting in a form that clients are likely to see and respond to quickly. Please contact your SmartAdvocate representative for additional information about the texting companies that integrate with SmartAdvocate.

The Structure of This Page

1. Case Number entry: Used to select the cases whose plaintiffs will receive the text message.
2. Case contacts selection: Used to select which plaintiffs in the cases receive the text message.
3. Message content: Contains the content of the text message. You can personalize the text message (i.e.: including the recipient's name) by including a merge code in the text or using a text template that includes the merge code.
4. Plaintiffs table: Lists the plaintiffs selected to receive the text message and allows you to individually deselect plaintiffs. If you have personalized the text, you can preview the personalized text message to be sent to a particular plaintiff by hovering the cursor over the magnifying glass icon on the right side of that plaintiff's row.


| Case # | Case Name | Plaintiff Name | Plaintiff Role | Phone | Phone Type | Text Plaintiff Email |
|-------------------------------------|-----------------------------------|------------------------|--------------------|----------------|--------------------|----------------------|
| <input checked="" type="checkbox"/> | 5015345 Robinson vs Scrooge | Robinson, Terry-Ann L. | (F)-Owner/Operator | | | terryannrobinson |
| <input checked="" type="checkbox"/> | 5015345 Robinson vs Scrooge | Robinson, A. Seth | (F)-Spouse | (914) 555-1212 | Home Primary Phone | Yes fake@gmail.co |
| <input checked="" type="checkbox"/> | 5015345 Robinson vs Scrooge | Jane, Marie | (F)-Passenger | | | |
| <input checked="" type="checkbox"/> | 5015345 Robinson vs Scrooge | Gingelheimer, John A. | (F)-Owner/Operator | (312) 349-6789 | Cell Phone | johngingelheimer |
| <input checked="" type="checkbox"/> | 5015345 Robinson vs Scrooge | Gingelheimer, Sheryna | (F)-Passenger | | | |
| <input checked="" type="checkbox"/> | 570090 Smith, Anthony → Doe, John | Smith, Anthony | (F)-Passenger | (306) 355-1230 | Cell Phone | anthony@smartad |
| <input checked="" type="checkbox"/> | 570090 Smith, Anthony → Doe, John | Smith, Jane | | | | |

Using This Tool

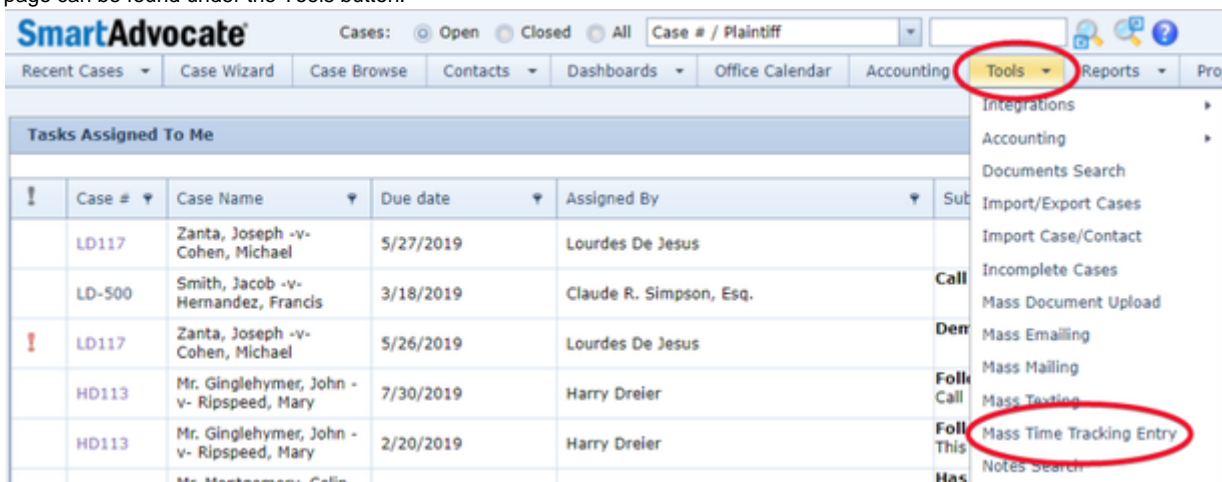
To use the Mass Texting tool to send a text message to multiple plaintiffs:

1. Type the list of cases that have plaintiffs you wish to send the text message to into the Case Number entry field and click the Show Results button. Case numbers must be separated by either a comma or a semicolon, or be on different lines.
 - If you have reached this page by using the Mass Update feature in Case Browse, the list will already be entered in the field for you.
2. By default, the text message will be sent to the primary plaintiffs in the selected cases. If you wish to change this behavior, click a different [Radio button](#) in the case contacts selection area. You can send the text message to the primary plaintiffs, the primary contacts, the primary plaintiffs and primary contacts (this will not send duplicate messages to plaintiffs marked as both), or to every plaintiff in the selected cases.
3. For each plaintiff, the text message will be sent to one phone number with the Text Messaging field selected in the plaintiff's [Contact Card](#). By default, if there is no such phone number, the message will not be sent to any number associated with that plaintiff. If you wish to allow the text message to be sent to more than one text-enabled phone number, select the Send to Multiple Available Phones checkbox. If you wish to include a phone number whose type includes the word "cell" for plaintiffs with no explicitly text-enabled phone number, select the "Use Cell" Label if no "Text" Check Available" checkbox. (If both checkboxes are selected, the text message may be sent to more than one "cell" number, but only if there are no text-enabled phone numbers associated with that plaintiff.)
4. If you wish to use an existing text message template, select it from the Template field. (Visit the [Text Message Templates](#) administrative page to view your existing text message templates.) Make any further changes to the content of the text message you wish. You may include merge codes when manually editing the text message, but there is no automatic merge code selection button in this tool; you have to manually type in the merge codes. If you are creating a text message that requires adding merge codes, it is probably more appropriate to first save it as a text message template, and then simply select that template in this tool. Admin privileges are required to create or edit a text message template.
5. If you wish to exclude any of the listed plaintiffs from receiving the email, do so by deselecting the Checkbox selector in that plaintiff's row.
6. If you are satisfied with the selection of plaintiffs and the content of the text message, send the message by clicking the Send button in the message content area.

Mass Time Tracking Entry

Generally, time tracking entries are made in each case separately, either by using the Time Tracking icon in the Quick Action Tool Bar () to start and stop the Timer, or by manually entering the time spent on the Time Tracking page.

However, the Mass Time Tracking Entry page allows you to add time tracking data into multiple cases simultaneously. The Mass Time Tracking Entry page can be found under the Tools button.



The screenshot shows the SmartAdvocate interface. At the top, there are navigation tabs: 'Recent Cases', 'Case Wizard', 'Case Browse', 'Contacts', 'Dashboards', 'Office Calendar', 'Accounting', 'Tools', 'Reports', and 'Profile'. The 'Tools' menu is open, and 'Mass Time Tracking Entry' is highlighted with a red circle. Below the navigation, there is a table titled 'Tasks Assigned To Me' with columns: Case #, Case Name, Due date, Assigned By, and Status. The table lists several cases, including LD117, LD-500, HD113, and HD113, with their respective case names and assigned users.

The Mass Time Tracking Entry function will allow the entry of a single time entry per case for a single day. (Additional time entries can be made after Saving the entries on the Mass Time Tracking Entry page.) It is best used for bulk time entry (i.e., "4.6 hours – preparation of motion" or "3.7 hours – in court for settlement conference, including travel"), rather than tracking each individual activity in a case (i.e., ".5 hours – preparation of notice of motion"; ".75 hours, preparation of proposed Court Order"; etc.). Entry of individual activities are more efficiently accomplished on the Time Tracking page of the applicable case or by using the Timer.

The Mass Time Tracking Entry page displays all cases to which the user is currently assigned. It lists the cases in the order in which the user last visited them, with the most recently visited case at the top.

| Mass Time Tracking Entry | | | | | | |
|--|---|--------------------|---|-------------|------------------|-------|
| Mass change all activity to: <input type="text"/> <input type="button" value="Apply"/> | | | | | | |
| Case Number | Case Name | Last Access Date | Case Status | Action Type | Duration (hours) | Notes |
| HD108 | Mr. Montgomery, Colin -v- Eli Lilly, | 8/2/2019 8:25 AM | Pre-Lit 01 - HT To Be Opened | | | |
| LD117 | Zanta, Joseph -v- Cohen, Michael | 8/1/2019 1:54 PM | Pre-Sign 03 - Under Review by Attorney | | | |
| HD113 | Mr. Ginglehymmer, John -v- Ripspeed, Mary | 8/1/2019 1:54 PM | Active | | | |
| HD103 | Robinson vs Scrooge | 7/16/2019 11:39 AM | Pre-Lit 04 - PI Demand to Be Prepared | | | |
| JC113 | Mr. Ginglehymmer, John -v- Ripspeed, Mary | 7/12/2019 3:05 PM | Pre-Lit 01 - PI New Case - Initial Letters to be Sent | | | |
| HD-500 | Smith, Jacob -v- , | 7/12/2019 11:56 AM | Pre-Sign 00 - New Lead | | | |
| HD102 | Hendon, Michael -v- Eli Lilly, | 6/26/2019 1:48 PM | Pre-Lit 05 - HT Verified/Qualified | | | |
| HD107 | Robuck, George -v- Marks, Jane | 6/26/2019 8:34 AM | Pre-Lit 01 - PI New Case - Initial Letters to be Sent | | | |
| LD120 | House, Mickey -v- House, Hinnie | 6/21/2019 2:42 PM | Pre-Sign 00 - New Lead | | | |
| HD105 | Chamberlain, Marjorie -v- Kindrosky, Manuel | 6/21/2019 2:42 PM | Pre-Lit 01 - PI New Case - Initial Letters to be Sent | | | |
| CS170047 | Chamberlain, Marjorie -v- Kindrosky, Manuel | 6/20/2019 2:50 PM | LIT 5A - PC Request Filed | | | |

The Mass Time Tracking Entry page has seven columns of data, four of which are automatically completed by the system:

- Case Number
- Case Name
- Last Access Date (the most recent date on which the user accessed the case in SmartAdvocate)
- Case Status (the current status of the case)

The other three columns are completed by the user for the entry of time tracking data:

- Action Type

The type of activity performed. This is a dropdown list, taken from the Time Tracking Activity Codes assigned to the case's Case Type on the Time Tracking Activity Code Relationships page in Picklist Maintenance.

- Duration (hours)

The time spent on the activity. If this field is left blank, no time tracking information will be transferred to the case.

- Notes

Enter any comments describing the activity.

Note that you must *double click* in a particular field in order to enter data or choose an item from a dropdown list.

A field at the top of the Mass Time Tracking Entry page allows for bulk entry of the Action Type for all listed cases. This is extremely useful if, for example, you are in court for multiple cases and want to divide the time spent among those cases.

Mass Time Tracking Entry

Mass change all activity to: **Apply**

- Administrative
- Court Appearance
- Deposition: Prep/Take/Defend
- Discovery
- Document Review
- Experts/Consultants
- Lead/Liaison Duties

Duration (hour)

Not been able to contact

Choose the activity from the drop-down list and click Apply. The chosen activity will appear in the Action Type column for all cases listed.

Mass Time Tracking Entry

Mass change all activity to: **Apply**

| Case Number | Case Name | Last Access Date | Case Status | Action Type | Duration (h) |
|-------------|--|--------------------|---|------------------|--------------|
| HD108 | Mr. Montgomery, Colin -vs- Eli Lilly, | 8/2/2019 8:25 AM | Pre-Lit 01 - MT To Be Opened | Court Appearance | |
| LD117 | Zanta, Joseph -vs- Cohen, Michael | 8/1/2019 1:54 PM | Pre-Sign 03 - Under Review by Attorney | Court Appearance | |
| HD113 | Mr. Ginglehymmer, John -vs- Ripspeed, Mary | 8/1/2019 1:54 PM | Active | Court Appearance | |
| HD103 | Robinson vs Scrooge | 7/16/2019 11:39 AM | Pre-Lit 04 - PE Demand to Be Prepared | Court Appearance | |
| JC113 | Mr. Ginglehymmer, John -vs- Ripspeed, Mary | 7/12/2019 3:05 PM | Pre-Lit 01 - PE New Case - Initial Letters to be Sent | Court Appearance | |
| HD-500 | Smith, Jacob -vs- , | 7/12/2019 11:56 AM | Pre-Sign 00 - New Lead | Court Appearance | |
| HD102 | Henron, Michael -vs- Eli Lilly, | 6/26/2019 1:48 PM | Pre-Lit 05 - MT Verified/Qualified | Court Appearance | |
| HD107 | Robuck, George -vs- Marks, Jane | 6/26/2019 8:34 AM | Pre-Lit 01 - PE New Case - Initial Letters to be Sent | Court Appearance | |

If you want to apply the Action Types to each case individually, leave this box empty. You can change the Action Type for a particular case by double clicking on the item and choosing a different Action Type for that activity.

Once Action Types have been selected for any cases for which you want to add a time tracking entry, double click in the Duration column to enter the time spent, and in the Notes column to enter a description for each case.

To save your entries, click on Save Changes on the bottom right portion of the screen.

Mass Time Tracking Entry

Mass change all activity to: **Apply**

| Case Number | Case Name | Last Access Date | Case Status | Action Type | Duration (hours) | Notes |
|-------------|--|---------------------|---|------------------|------------------|-------|
| HD113 | Mr. Ginglehymmer, John -vs- Ripspeed, Mary | 8/2/2019 2:41 PM | Active | Court Appearance | | |
| HD115 | Costanzo, George -vs- Newman, Chuckles | 8/2/2019 1:16 PM | Pre-Sign - Not been able to contact | Court Appearance | | |
| HD108 | Mr. Montgomery, Colin -vs- Eli Lilly, | 8/2/2019 11:36 AM | Pre-Lit 01 - MT To Be Opened | Court Appearance | | |
| LD117 | Zanta, Joseph -vs- Cohen, Michael | 8/2/2019 8:26 AM | Pre-Sign 03 - Under Review by Attorney | Court Appearance | | |
| HD103 | Robinson vs Scrooge | 7/16/2019 11:39 AM | Pre-Lit 04 - PE Demand to Be Prepared | Court Appearance | | |
| JC113 | Mr. Ginglehymmer, John -vs- Ripspeed, Mary | 7/12/2019 3:05 PM | Pre-Lit 01 - PE New Case - Initial Letters to be Sent | Court Appearance | | |
| HD-500 | Smith, Jacob -vs- , | 7/12/2019 11:56 AM | Pre-Sign 00 - New Lead | Court Appearance | | |
| HD102 | Henron, Michael -vs- Eli Lilly, | 6/26/2019 1:48 PM | Pre-Lit 05 - MT Verified/Qualified | Court Appearance | | |
| HD107 | Robuck, George -vs- Marks, Jane | 6/26/2019 8:34 AM | Pre-Lit 01 - PE New Case - Initial Letters to be Sent | Court Appearance | | |
| LD120 | Hause, Hickey -vs- Hause, Monte | 6/21/2019 2:42 PM | Pre-Sign 00 - New Lead | Court Appearance | | |
| HD105 | Chamberlain, Harjorie -vs- Kindroski, Manuel | 6/21/2019 2:42 PM | Pre-Lit 01 - PE New Case - Initial Letters to be Sent | Court Appearance | | |
| CS170047 | Chamberlain, Harjorie -vs- Kindroski, Manuel | 6/20/2019 2:50 PM | LIT 5A - PC Request Filed | Court Appearance | | |
| HD109 | Shizwiler, Eric -vs- , | 5/2/2019 10:43 AM | Pre-Sign 00 - New Lead | Court Appearance | | |
| HD120 | Hause, Hickey -vs- Hause, Monte | 2/28/2019 1:42 PM | Pre-Sign 00 - New Lead | Court Appearance | | |
| HD116 | Mrs. Pain, Sarah -vs- Dr. Obama, Barry | 2/18/2019 3:35 PM | Pre-Sign 00 - New Lead | Court Appearance | | |
| HD110 | The People of the State of New York -vs- Jones | 1/29/2019 8:34 AM | LIT 9 - Trial data received from court | Court Appearance | | |
| JV3013345 | Robinson vs Scrooge | 12/11/2018 8:48 AM | LIT 2F - Summons & Complaint Out for Service | Court Appearance | | |
| HD104 | Smith, Anthony -vs- Eli Lilly, | 12/10/2018 7:23 AM | Pre-Sign 00 - New Lead | Court Appearance | | |
| HD119 | Mr. Depp, Sinisa -vs- United States Court of Federal Claims, | 10/22/2018 10:00 AM | Pre-Sign 00 - New Lead | Court Appearance | | |

Page 1 of 1 (41 items)

41 Preview changes **Save changes** Cancel changes

All time entries will be placed in the Time Tracking page in the appropriate case. The entries will be made for the current date, with a start time equal to the current time when the entry was made. The end time will be calculated based on the start time and the event duration entered.

Entries will only be made in those cases for which an Action Type has been chosen and a Duration entered.

Once the entries have been saved, they will be transferred onto the Time Tracking page in the appropriate cases. The following information will be transferred to the Time Tracking page:

- Action Type (Will be placed in the Activity column on the Time Tracking page.)
- Duration (Will be placed in the Duration column and used to calculate the End Time and the Billable Amount.)
- Notes (Will be placed in the Comments column on the Time Tracking page.)

In addition, the following information will automatically be inserted into these columns on the Time Tracking page:

- Status: Will always be set as Performed.

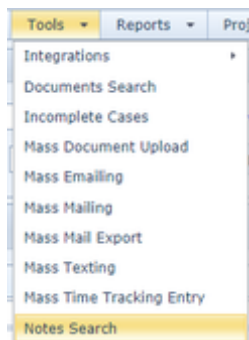
- Staff: The actions will be entered under the name of the staff member who entered the information on the Mass Time Tracking Entry page.
- Tracking Date: The actions will be listed as having occurred on the date they were entered on the Mass Time Tracking Entry page.
- Start Time: The Start Time will be entered based on the time the entry was made on the Mass Time Tracking Entry page.
- End Time: The End Time will be entered based on the Start Time and the Duration entered on the Mass Time Tracking Entry page.
- Billing Rate: The billing rate will be taken from the staff member's User Card.
- Billable?: All entries made on the Mass Time Tracking Entry page are shown on the Time Tracking page as Billable.
- Shared Expenses: All entries made on the Mass Time Tracking Entry page are shown on the Time Tracking page as Shared Expenses.

Once the entries have been saved on the Mass Time Tracking page and transferred to the Time Tracking pages in the appropriate cases, any necessary edits can be made in the Time Tracking pages.

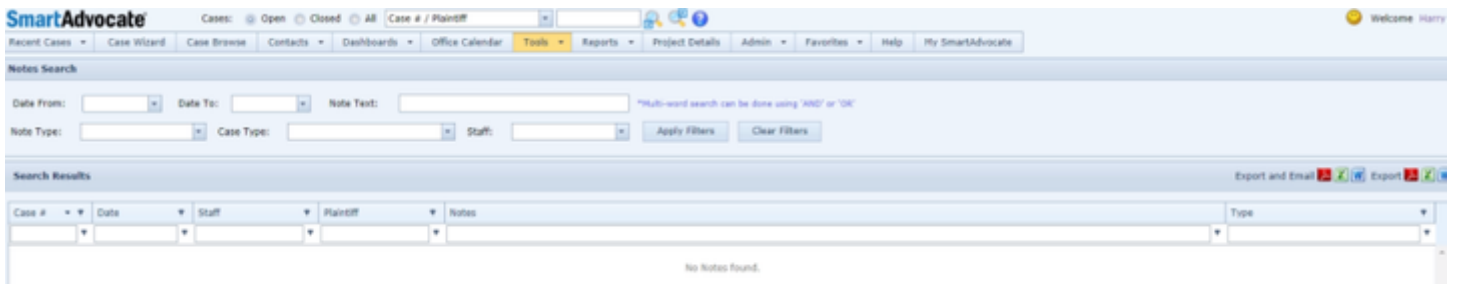
Notes Search

SmartAdvocate allows you to do a global, system wide search to locate a note in any file in the system. There are instances, for example, when you know you have created a specific note, but may not remember the specific file in which the note was created or when that note was created. The "Notes Search" feature under the "Tools" section will allow you to do a global search to locate the note.

1. Choose "Tools" from the top task bar
2. Then choose "Notes Search" from the dropdown list of menu items

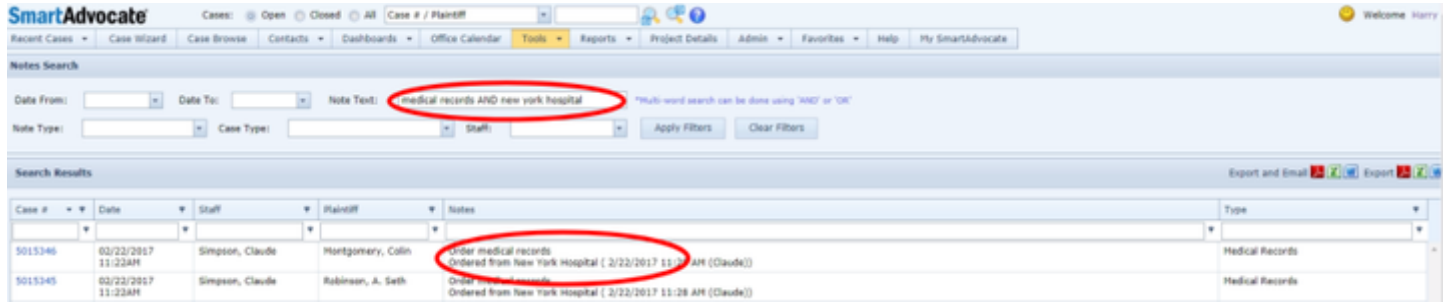


The "Notes Search" selection screen will be displayed:



1. You may limit your search to specific dates if you wish. To search for Notes regardless of date, click on the down arrow to the right of both the "Date From" and "Date To" boxes and click on the "Clear" buttons.
2. You have the option of limiting your search to specific Note Types, Case Types, and/or Staff.
3. Enter a Note Text (i.e., word(s) for which you want to search).
4. Click the "Apply Filters" button to execute the search.

If there is text contained in any Notes in the system that satisfy your search criteria, a list of cases will be displayed. In the example below, the search term used was "medical records AND new york hospital" (without the quotation marks), which resulted in the list displayed.



Learn more about Notes: [Add Quick Note](#)

Make use of the Documents and Notes Search features in SmartAdvocate

Unassigned Documents

The Unassigned Documents tool provides a list of any documents that were scanned but were not successfully processed by the Barcode Scanning service (usually due to unreadable or missing barcode). It allows you to set the properties for, and attach documents to the cases to which they are related.

The Unassigned Documents tool is essentially the same as, and functions identically to, the Mass Document Upload tool, except that the Unassigned Documents tool is pre-filled with any documents that have been scanned, were not successfully processed by the Barcode Scanning service, and have not yet been attached to a case.

For details on the functionality of the Unassigned Documents tool, please see the Mass Document Upload tool.

Copy Merge Cases

This page is currently under construction. Please check back for updates!

Time Tracking Review

The Time Tracking page allows you to view and record the details of activity for which you need to track your time spent. Note: this page does not itself track the time spent on an activity. Use the Time Tracking icon to actually track time. However, the system will automatically take you to this page at the end of a session of time tracking in order to save the record in the system.

The Structure of This Page

| Summary | | | | | | | | | | |
|------------------------|--------------------|--------------------|-------------------|-----------------|-------------------|--------------------|---------------|--|--|--|
| Plaintiffs | Total | Billable | | | | | Non-Billable | | | |
| | | No Status | Invoiced | Paid | Performed | Total | | | | |
| Robinson, Terry-Ann L. | 1 \$10,268.33 | \$6,433.33 | \$1,135.00 | \$200.00 | \$2,300.00 | \$10,268.33 | \$0 | | | |
| Jane, Marie | \$5,368.33 | \$3,833.33 | \$235.00 | \$200.00 | \$1,100.00 | \$5,368.33 | \$0 | | | |
| SIMPSON, CLAUDE R. | \$18,618.33 | \$15,883.33 | \$235.00 | \$200.00 | \$2,300.00 | \$18,618.33 | \$0 | | | |
| | \$34,254.99 | \$26,349.99 | \$1,605.00 | \$600.00 | \$5,700.00 | \$34,254.99 | \$0.00 | | | |

| Time Tracking | | | | | | | | | | | | | |
|---------------|--------|-----------------------|---|---------------|------------|----------|----------|--------------|-----------------|-----------|-------------------------------------|--------------------------|--------|
| Activity | Status | Staff | Plaintiffs | Tracking Date | Start Time | End Time | Duration | Billing Rate | Billable Amount | Billable? | Shared Expenses | Comments | Action |
| Discovery | | Simpson, Claude, Evis | SIMPSON, CLAUDE R. | 2/15/2016 | 10:00 AM | 12:30 PM | 02:30 | \$250.00 | \$500.00 | Yes | <input type="checkbox"/> | | |
| Discovery | | Admin, A. | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/25/2016 | 02:42 PM | 03:12 PM | 00:30 | | | No | <input checked="" type="checkbox"/> | | |
| Research | | Selichuk, Igor | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/29/2016 | 09:00 AM | 11:00 AM | 02:00 | | | No | <input checked="" type="checkbox"/> | Medical records research | |

1. Summary table. Displays the total monetary values (billable, non-billable, and overall) of the tracked time spent on behalf of each plaintiff. See [Summary Table](#).
2. Add Time Tracking button. Used to add a new span of tracked time to the case file. See [Adding Tracked Time](#).
3. Time Tracking table. Contains the time tracking details and allows various actions to be performed on them. See [Time Tracking Table](#).

Summary Table

The Summary table totals the billing amounts in the Time Tracking table. It is updated automatically when changes are made to the Time Tracking table; no changes may be made to the Summary table directly. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Summary table contains the following columns:

| Summary | | | | | | | | | | |
|------------------------|--------------------|--------------------|-------------------|-----------------|-------------------|--------------------|---------------|--|--|--|
| Plaintiffs | Total | Billable | | | | | Non-Billable | | | |
| | | No Status | Invoiced | Paid | Performed | Total | | | | |
| Robinson, Terry-Ann L. | 1 \$10,268.33 | 2 \$6,433.33 | 3 \$1,135.00 | 4 \$200.00 | 5 \$2,300.00 | 6 \$10,268.33 | 7 \$0 | | | |
| Jane, Marie | \$5,368.33 | \$3,833.33 | \$235.00 | \$200.00 | \$1,100.00 | \$5,368.33 | \$0 | | | |
| SIMPSON, CLAUDE R. | \$18,618.33 | \$15,883.33 | \$235.00 | \$200.00 | \$2,300.00 | \$18,618.33 | \$0 | | | |
| | \$34,254.99 | \$26,349.99 | \$1,605.00 | \$600.00 | \$5,700.00 | \$34,254.99 | \$0.00 | | | |

1. Plaintiffs: The plaintiff whose time tracking totals are listed.
2. Total: The total value of all tracked time spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.

3. **Billable No Status:** The total value of all tracked time spent on the plaintiff's behalf that does not have a status attached to it. The sum of this column across all rows in the table appears below the last row of the column.
4. **Billable Invoiced:** The total value of all tracked time spent on the plaintiff's behalf which has been included on an invoice. The sum of this column across all rows in the table appears below the last row of the column.
5. **Billable Paid:** The total value of all tracked time spent on the plaintiff's behalf for which your firm has been paid. The sum of this column across all rows in the table appears below the last row of the column.
6. **Billable Performed:** The total value of all tracked time spent on the plaintiff's behalf for which the status is Performed.. The sum of this column across all rows in the table appears below the last row of the column.
7. **Billable Total:** The total value of all billable tracked time spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.
8. **Non-Billable Amount:** The total value of all non-billable tracked time spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.

Time Tracking Table

The Time Tracking table is where the details of spans of tracked time are stored. Each row of the table represents an individual span of time. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Time Tracking table contains the following available columns:

| Add Time Tracking | | Time Tracking | | | | | | | | | | | | | Export |
|-------------------|--------|-----------------------|---|---------------|------------|----------|----------|--------------|-----------------|-----------|-------------------------------------|--------------------------|--------|--|--------|
| Activity | Status | Staff | Plaintiffs | Tracking Date | Start Time | End Time | Duration | Billing Rate | Billable Amount | Billable? | Shared Expenses | Comments | Action | | |
| Discovery | | Simpson, Claude, Esq. | SIMPSON, CLAUDE R. | 2/15/2016 | 10:00 AM | 12:30 PM | 02:30 | \$250.00 | \$500.00 | Yes | <input type="checkbox"/> | | | | |
| Discovery | | Admin, A. | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/25/2016 | 02:42 PM | 03:12 PM | 00:30 | | | No | <input checked="" type="checkbox"/> | | | | |
| Research | | Selzhuk, Igor | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/29/2016 | 09:00 AM | 11:00 AM | 02:00 | | | No | <input checked="" type="checkbox"/> | Medical records research | | | |

1. **Activity:** The type of activity being performed during the span of time.
2. **Status:** The status of the activity.
3. **Staff:** The staff member performing the activity.
4. **Plaintiffs:** The plaintiffs on whose behalf the activity was performed.
5. **Tracking Date:** The date the activity was performed.
6. **Start Time:** The start of the span of time.
7. **End Time:** The end of the span of time.
8. **Duration:** The length of the span of time, expressed in hours and minutes.
9. **Billing Rate:** The amount billed for the activity, per hour.
10. **Billable Amount:** The total value of the activity over the span of time.
11. **Billable?:** Whether the span of time represents billable hours.
12. **Shared Expenses:** Whether the total value of the activity should be split equally among all plaintiffs.
13. **Comments:** Any comments about the span of time.
14. **Action:** [Right-click icon](#); right-click menu contains Edit and Delete.

Additional columns are available for the Time Tracking table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Duration (hours), Invoice #, Invoice Date, Status Date.

Editing Tracked Time

To edit a span of tracked time:

1. Click the [right-click icon](#) in the Action column of the row representing the span of time you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the span of time you wish to edit. This will bring up an Add/Edit panel for tracked time, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tracked time, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Time Tracking Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Tracked Time

To delete a span of tracked time:

1. Click the [right-click icon](#) in the Action column of the row representing the span of time you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the span of time you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the span of time, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Tracked Time

To add a new span of tracked time:

1. Click the Add Time Tracking button. This will bring up an Add/Edit panel for tracked time, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Time Tracking Panel](#) for details about the fields.
3. Click Save to save the span of time and close the panel.
 - If you decide you do not wish to save the span of time, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Time Tracking Panel

The Add/Edit Time Tracking Panel allows you to fill in the details of a span of tracked time. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Staff: The staff member performing the activity.
2. Activity: The type of activity being performed during the span of time.
3. Status: The status of the activity being performed.
4. Status Date: The date on which the current status was set for the activity.
5. Invoice #: The identification number of the invoice on which the activity was billed.
6. Invoice Date: The date on which the invoice on which the activity was bill was issued.
7. Tracking Date: The date the activity was performed.
8. Start Time: The start of the span of time. If the End Time field is not blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to reflect the time difference between this field and the End Time field. If the End Time field is blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to zero, and set the End Time field to the time in this field.
9. End Time: The end of the span of time. If the End Time field is not blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to reflect the time difference between the Start Time field and this field. If the End Time field is blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to zero, and set the End Time field to the time in this field.
10. Duration: The length of the span of time, expressed in hours and minutes. Changing this field will automatically set the Duration (hours) field to the equivalent of this field in hours with decimal points. If the Start Time field is not blank, changing this field will automatically set the End Time field to the time in the Start Time field plus the length of time in this field. If the Start Time field is blank, changing this field will automatically set the Start Time field to the current time, and set the End Time field to the current time plus the length of time in this field.
11. Duration (hours): The length of the span of time, expressed in hours, with two decimal points. Changing this field will automatically set the Duration field to the equivalent of this field in hours and minutes. If the Start Time field is not blank, changing this field will automatically set the End Time field to the time in the Start Time field plus the length of time in this field. If the Start Time field is blank, changing this field will automatically set the Start Time field to the current time, and set the End Time field to the current time plus the length of time in this field.
12. Billing Rate: The amount billed for the activity, per hour. If this field is not blank, clicking the Auto Calculate button next to it will automatically set the Billable Amount field to the amount in this field times the number of hours in the Duration field, counting minutes as 1/60 of an hour.
13. Billable Amount: The total value of the activity over the span of time.
14. Billable?: Whether the span of time represents billable hours.
15. Shared Expenses: Whether the total value of the activity should be split equally among all plaintiffs. If neither this field nor any of the checkboxes in the Plaintiffs field is selected, the record will not save.
16. Plaintiffs: The plaintiffs on whose behalf the activity was performed. This field is uneditable if Shared Expenses is selected. If neither Shared Expenses nor any of the checkboxes in this field is selected, the record will not save.
17. Comments: Any comments about the span of time.

Import Case/Contact

This page is under construction. Check back for updates!

UDF Export

This page is currently under construction. Check back soon for updates!

Reports

Reports Overview

[Make Use of the Client Contact Overdue Dashboards and Reports Video](#)

[Use The Staff Activity Report To Keep Track Of And Monitor Staff Productivity](#)

[How to create a Referred-Out Firm Report using Case Browse](#)

[The Settlement Forecast Report](#)

[How to Search for Cases Using UDFs](#)

[Medical Provider Referral Report](#)

For an overview on Dashboards, jump to: [Dashboards](#)

Reports Overview

SmartAdvocate reports produce a formatted text and/or visual representation of various aspects of your firm's caseload. They can be exported to a number of formats for analytical use. Additionally, reports offer a subscription option, which causes the report to be regularly produced and emailed to the subscriber. This is an extremely useful tool for keeping track of some collection of data consistently, without having to remember to do anything. The following is a brief summary of each report's purpose and parameters. Legacy reports, which remain in the system for the sake of consistency but have become obsolete or are otherwise not recommended, are not listed here.

Calendar Reports

Adjourned/Canceled Appointments Report: Lists appointments that were recently canceled or adjourned. Parameters include the number of days the report covers, and whether the report should include mass tort cases, single event cases, or both.

Calendar Report: Lists items from the [Calendar](#). The parameters are similar to the Calendar filters, and this report is the same one created when clicking the Report button in the Calendar itself. This report is taken from the Office Calendar and thus both Case related and non-Case related appointments are included in the report.

Calendar Report Advanced: Lists items from the calendar in the form of a table. The parameters are nearly the same as the regular Calendar Report, but it is also possible to select which columns appear in the table. (The table is entirely textual; none of the usual table tools are available, other than those provided through the report interface.) The Case Number, when available, is a link; clicking on it will take you to the Case Summary for that case. This report is taken from the Office Calendar and thus both Case related and non-Case related appointments are included in the report.

Client Birthday Report: Lists all clients whose birthdays are within the month(s) designated for the report. Other than the date range, the only parameter is whether the report should include clients from all cases, only open cases (which is the default), only closed cases, or only closed cases with a settlement entered.

Who is Where Tomorrow Report: Lists appointments taking place on a selected day (tomorrow by default). Appointments are listed by the Office in which staff members work, and then in alphabetical order by the staff members (ordered by first name), and the staff members' names are underlined and bolded. The only parameter is the day the report covers.

Case Information Reports

Bankruptcy Report: Bankruptcy Information: Lists all recorded bankruptcy information on a selected set of cases. Parameters include party type, open/closed cases, case status, case group, and case type. Lists the results in a text table. Columns include the case number, case name, case type, case status, incident date, case attorney, paralegal, case manager, party name, bankruptcy type, party type, court, judge, letter to trustee, claim number, comments, release to trustee, filing date, docket number, trustee, retained by trustee, and attorney.

Case Notes: Case Notes: Lists all notes on a selected set of cases. The sole parameter is a set of case numbers, separated by commas. Each case's notes are listed in a text table with columns for the date, creator, and content of the note. Each table also includes the case number, plaintiff, plaintiff's phone number, plaintiff's insurance, defendant's law firm and attorney, the phone number of the defendant's attorney, and the court and docket number of the case.

Case Time Tracking: Lists time tracking by selected staff within a selected time range. Lists the results in a text table. Columns include the date of the activity, case number, staff member performing the time tracking, the activity being tracked, the duration of the activity, the total billable amount incurred by the activity, and any comments. The time range can be selected either as a pair of dates, or as numbers of days before the current date. The columns shown in the report can be selected as an additional parameter.

Document Search Report: Lists, in a text table, all documents created during a set time period and meeting the parameters selected. Parameters include document date range, created date range, created from and to days ago (setting both to zero, which is the default, sets the report date range to the current date), created by, direction, category and sub-category, from and to, case group and type, person case is assigned to, office location, a text box allowing a search of the document description, and case number. Most columns are optional, and column selection is one of the parameters. "Open Document" is a required column and clicking on "Open" in that column will open the document.

Employment Report: Shows Employer name, date of employment, employment status, department, job title, work site, trade, union, contact person, employer comments. The available filters for their report include case open/close, case status, case group, case type, staff, trades, employer name and union name. The Columns available in the report are those items previously mentioned.

Insurance Company Report: Lists, in a text table, insurance companies that cover plaintiffs or defendants. Almost every column is optional, and the selection of columns is one of the parameters. Other parameters include whether to list open or closed cases, the case status, type, and group, the staff member involved with the case, whether the insurance company covers the plaintiff or the defendant, the insurance type, and the insurance company and adjuster name.

Last Case Note Report: Lists, for each case, the note most recently modified or created. Columns include the primary plaintiff, the case number, type, status, and subtype, the number of days spent in the current status, the staff member who most recently modified or created a note, the date the note was created or modified, and the text of the note. Parameters include the case type and status, note type, and staff member.

Notes Search Report: Allows searching notes and critical comments by date, type, staff, and key words.

UDF Report: Lists, in a text table, all cases of a chosen case type in which at least one UDF has been completed. Parameters include case type (a single case type must be chosen for this report to run), screen name (the name of the screen containing UDFs that the report will search), and case status. The columns include case number, name, and status, and a column for the response entered for each UDF created for the chosen case type.

UDFs Created/Modified Report:

Witness Report: Lists the witnesses that have been designated in the case with the witness type and other information that would have been specified for the witness, such as whether the witness was listed as favorable, will testify, etc. The filters available include case status, open/closed, case group, case type, staff, witness name contain, witness type and criteria. There are sixteen columns available for display.

Case Management Reports

Case Browse Report: Runs a Case Browse search based on one of a chosen user's Favorite Filters. The only parameters are the user's name and a list of that user's Case Browse Favorite Filters. The columns included in the report are the same as those saved in the Favorite Filter used.

Cases by Case Type: Separates cases by case type, and provides counts of new cases, and newly signed cases, both in a recent time period and overall. Parameters include the length of the recent time period (past 24 hours, seven days, or month), the case types to include in the report, the firm office, whether to restrict the report to cases with serious injuries, and whether to restrict the report to mass tort cases.

Case Minimum Settlement Value Not Set: Lists cases where the Minimum Settlement Value (set in the Edit Case panel in the [Case Summary](#) page) is blank. The results are listed in text tables, containing basic case and staffing information, and the estimated value of the case. Parameters include the case type, status, and estimated value.

Cases In Status: Lists cases in a text table. Parameters include a date range for the opening date of the case, the case status (or substatus of any status type) and the case group. You can choose the columns to include in the report, which is a separate parameter.

Case Status Change: Lists cases whose status changed within a selected time range. Lists the results in a text table; columns include the case number, type and name, incident date, the pre-change status and when it was applied, the post-change status and when the change occurred, and the total number of days the case spent in the pre-change status, and the staff member who changed the status.

Case Statistics: Provides statistics representing the number of cases in a particular date range that have experienced various types of activity, in particular new inquiries, sign ups, closures, referrals, offers, and settlements. Parameters include the date range in the form of numbers of days before the current date, case groups, case types, statuses to include in the signup breakdown, advertisers that should appear in the inquiry breakdown even if they generated no inquiries during the date range, and any statuses to be excluded from the report.

Cases without Incident Date: Lists in a text table all cases in which no incident case has been entered, except any cases that have been referred out. Parameters are case type and staff. Columns include case number, case type and subtype, plaintiff, case status, attorney and paralegal.

Closed Cases With No Fee: Lists cases that have disbursements recorded, but have been closed without generating a fee. The results are listed in a text table with the case number, name, type, and total disbursement amount. The total disbursement of all cases in the table is listed above the table, and the cases are grouped by case group and case type, with the totals for each case group and case type listed at the top of the respective set of cases. Parameters include a date range, case types, whether to include mass tort cases, and a text box to enter a minimum amount of disbursements in order to include a case in this report.

Missing Barcoded Documents: Allows to find documents that were barcoded (barcodes generated), but not scanned. Parameters include who generated the document, the case staff, how many days back the barcode was generated, and whether the barcode was generated manually or in a template. Optionally, there are parameters to determine if the barcode was generated more than a certain number of hours ago and to exclude any barcodes generated a certain number of days ago. The columns in this report include case number and name, from name, to name, category and sub-category, who generated barcode and what date and time it was generated, the description assigned to the barcode and how the barcode was generated.

Problem Cases: Lists cases with at least one problem for which a warning has been set. Parameters include the warning type (Cases with calls not returned, Lit - No Court, Lit - No Defendant Attorney, Lit - No Defendant Insurance Company, Missing Facts, No Attorney, No Defendant, No Incident Date, No Incident State, No Retainer Date, Plaintiff Missing, PreLit - No Defendant Insurance Company, Referral Without Name) and staff. Columns include Case number, name, and status, case manager, paralegal, attorney, priority, and warning type.

Financial Reports

Advertisement Campaigns: Similar to Advertisement Campaigns Dashboard this reports shows performance of Advertisement campaigns. See Similar to Advertisement Campaigns Dashboard this reports shows performance of Advertisement campaigns. See [Dashboards Overview](#) for more on the Advertisements Campaigns Dashboard. for more on the Advertisements Campaigns Dashboard.

Case Expenses with Interest Report: This report generates a list of case costs(expenses) for a specific case and calculates interest on each amount.

Case Settlement Values: Lists settlements reached in a selected time range. The results are listed in text tables, grouped by the attorney who reached the settlement.

Case Values: Lists cases whose estimated value and minimum settlement value are in selected ranges. The results are listed in text tables, grouped by either the case attorney or case manager. Parameters include the attorney or case manager to whom to apply the report, the case status, settlement value range, estimated value, and whether to restrict the report to mass tort cases. Information in the table includes defendant and plaintiff insurance information, the estimated value range, the minimum settlement value, and any comments about the case value.

Checks Audit Trail Report: This reports shows creation/deletion/modification of settlement distribution checks.

Checks Received/Distributed Report: This report shows settlement and settlement distribution checks in specified time interval. Can be filtered by check direction and type, as well as case group or type.

Disbursement Summary Report: Lists cases total disbursement amounts (can be limited to case with disbursement amount greater than the set disbursement limit). Parameters include case group and type; staff member; whether to show only open cases, only closed cases, or all; and whether the report should list all cases with any disbursements at all rather than only those where the disbursements exceed the limit. Clicking on the Case Number in the report will bring you to the case summary for that case.

Disbursement Report: Lists all disbursements entered in SmartAdvocate that meet the parameters set. The results are listed in text tables, in reverse date order. Clicking on any column heading will sort the results by the information in that column. Parameters include the dates covered by the report, minimum and maximum amount of the disbursements, check status, disbursement type, case status, payee name, and check number. Another parameter allows you to choose the columns to include in the report.

Expense Analysis Report:

Fees Deposited: Lists recorded fees in a text table. Columns include the case number, plaintiff name, amount of the fee, date deposited, attorney responsible for the settlement, number of days between the settlement and the fee, and whether the case was handled in-house.

Fees Outstanding: Lists cases with outstanding fees in a series of text tables, with each table associated with the attorney responsible for the settlement. Most columns are optional, and the selection of columns is one of the parameters. Other parameters include the attorney or case manager, whether to include open or closed cases, whether to include settlements that do not generate a fee, the case referral status, and the date range.

Funding Report: This report returns funding information for cases (from case Funding page, not Liens page). Parameters on this report include who Funding was provided by, date ranges for the open date of the case receiving the funding and the date range the agreement was signed. Columns in this report include Case number, type, sub-type and status, M1, M2 and M3 statuses, plaintiff name, who funded the case, the amount funded, any commented related to the funding, agreement date, plaintiff date of birth and plaintiff state.

Lead/Case Cost Report Per Campaign:

Lien Report: Lists liens in a text table. Columns include the case number, plaintiff name, case status, the paralegal and attorney, the lienor and the lienor type, the lien date, the confirmed and unconfirmed amounts of the lien, the current payoff amount, and the Negotiated/Final Lien Amount. Parameters include the date range of the lien, whether to include open or closed cases, the staff member involved with the case, the lienor type, the lienor name, and whether to include liens without a date.

Medical Bill vs. Policy Limit: This report shows total medical bills for cases and compares it to available insurance coverage.

Money in Trust Account: This report shows balances of settlement escrow accounts by account.

QuickBooks Disbursements Report: In the event the integration between SmartAdvocate and QuickBooks has been enabled, this report lists all case related disbursements, whether entered directly in QuickBooks, or entered in SmartAdvocate and transferred to QuickBooks through the integration (including any updates to the integration). Columns include case number and name, amount of the disbursement, bill date, invoice number, check date and number, description, disbursement type, QuickBooks vendor, date created and modified, date updated in QuickBooks. The only available parameter is the date range for the report.

Settlements by Case Group/Type: This report shows number of calls, sign ups, settlements, total settlement amounts, average settlement amounts, total firm fee and average firm fee all categorized by case group/type.

Settlement Forecast Report: Provides anticipated upcoming case settlements, based up the Expected Resolution Date field. (See Case Summary.) Note that if the Expected Resolution field is not filled out, this report will not populate for that case. Almost every column is optional, and the selection of columns is one of the parameters. Other parameters include date range, staff, and office ID (location). Columns include case number, name, and status, open date, case group, attorney, minimum value, expected resolution date, disbursement amount, projected fee, referral fee, and net fee.

Settlement Performance (Min. Value): This report shows settlement performance of staff in relationship to set minimum settlement of cases. How many cases were settled below, at, or above minimum settlement values.

Settlement Report: Lists settlements in a text table. Columns include the case number, case type, plaintiff name, the dates that the settlement was reached, the settlement release was sent to the plaintiff, the signed release was received from the plaintiff, and the signed release was sent to the insurance company, the amount of the settlement, the company being settled with, the case status and sub-status, and the comment on the case status. Parameters include the date range of the settlement, the case status and type, and whether to include open or closed cases. Most columns are optional, and the selection of columns is one of the parameters.

Upside Down Medicals Report: This report shows cases with Total Medical Bills exceeding certain percentage of Minimum Settlement Value.

Intake Reports

Closed Reason Statistics: Shows number and percentage of cases closes with various close reasons.

Comparative Yearly Statistics for Intake: Lists intake statistics by month for the period chosen, alongside a table covering the same month for the previous year. Lists the results in a text table; columns include total calls, wanted cases, signed cases, wanted percentage, conversion percentage, and overall signed percentage. Also visualizes the absolute numbers and percentages in two graphs. Parameters include the end date of the date range, the number of months prior to the end month to include in the report (with a maximum for the report to cover a period of 12 months), the case group, case type, paid referral source, and whether to restrict the report to mass tort cases.

Conflict Report: This report displays potential conflicts for the cases opened in the specified time interval. The matching is done based on the name of plaintiff or defendant.

Daily Cases Opened: Lists cases that have been opened in a selected date range in a series of text tables, with each table associated with an individual day. Columns include the case number, date and time of opening, the case type, incident state, paid referral, other referral, and referring attorney. Parameters include the date range, case group, case type, and whether to restrict the report to mass tort cases.

Daily Single Event Cases Opened: Lists single event case intakes by case opening date. Parameters include the date range, case group, referral status, and whether to restrict the report to mass tort cases.

Hourly Call Patterns: Breaks down the number of case intakes in recent weeks by half-hour increments for each day of the week. Also visualizes the breakdown in a graph. Parameters include the end date of the date range, the number of weeks prior to the end date to include in the report, whether to include imported cases, and whether to include cases referred by an attorney.

Intake Analysis: Provides statistics about recent case intakes. Statistics include the number of cases, the number of cases that reached each sign-up status, the number of cases closed without a retainer, the number of intakes reviewed by an intake manager, the number of retainers received, and a breakdown by case group of the numbers of new cases, cases that reached a sign-up status, and retainers received. Parameters include the date range, case group, case type, office hours, and whether to restrict the report to mass tort cases.

Intake Performance Report: Shows intakes done over the specified date range. Filters include date open range, case type, staff type, signup type, whether to include referred in and office. The Intake Performance itself measure matrices including number of inquiries, wanted, SignUp %, Sign Up, Conversion %, Overall Retained %, True Signups, True Conversion %, Referred Out, Chase Calls and Average Time to Return Sign Up Kit.

Lawyer Referral Source by Case Closing Date: Lists closed cases that were referred to your firm by other law firms or attorneys. Columns include the case number and type, plaintiff name, opening and closing dates, case status, and the referral source. The only parameters are the start and end of the range of closing dates.

Lead Analysis Report: Displays visualizations of statistics about leads. Statistics include the date and time of intake, the gender and age of the prospective client, the case group, county, state, city, zip code, and referral source of the lead. Parameters include the date range, advertisement campaign, whether to restrict the report to retained cases, and whether to show "others" (i.e.: cases not otherwise listed) in various sections of the report.

Monthly Intake Statistics: Lists intake statistics for each month in a twelve-month period in a text table, broken down by case group. Statistics include the number of intakes, cases wanted, cases signed, cases wanted but closed, cases still being followed up, and the conversion percentage. Parameters include the end date of the twelve-month period.

New Case Report: Lists cases opened in a selected date range in a text table. Every column is optional, and the selection of columns is one of the parameters. Other parameters include the date range and the referral source.

Referrals By Clients: This report lists cases that were referred by firms clients. Can be filtered by case open dates, case type and retained/not retained.

Referred-Out Firm Performance: Report will display list of firm cases have been referred to with totals for number of cases referred, cases still in open stage (not settled), cases settled with fee, cases settled with no fee, total fees in dollars, average fees (settled case), average fees for all cases, average time from cases referred to settled.

Litigation Reports

Discovery Report: Shows discovery demands/requests with date(s) requested and deadline(s). Standard filters include days back - days to, discovery type, case type, case status, complied and waived. The report also allows the selection of certain columns to include in the report.

Evidence Storage Report: This report allows to search case evidence page globally. Can be filtered by Evidence Type, ID, and various dates (removed, returned, disposed).

Expert Report: This report allows to search case experts globally. Can be filtered by Expert Name, Specialty, Sub-specialty and Case Type, Status, Group.

Medical Reports

Injury Report: This report provides list of injuries for cases that fit report criteria. Can be filtered by Case Type, Status, Staff and Open Date.

Medical Provider Referral Report: This reports provides summary of referrals to and from medical providers split by months.

Medical Records Request Report: Lists in a text table the medical records requests whose follow-up date is past due or upcoming. Columns include case information (case number, name, and status), the request date, the staff member assigned to the request, the medical provider, the date the request status last changed, the follow-up date, and the combined information of the request. Parameters include the staff member assigned to the request, case type, request status, and a number of days; only requests whose follow-up date is fewer than that many days in the future will be included in the report.

Medical Records Requests Summary Report: A brief summary of medical requests. Parameters include date from and case type.

Medical Records Retrieval Performance Report: This report lists individual medical records requests with requested date, received date and days to receive. Can be filtered by dates, office, case type and case group.

Medical Records Update Report: This report shows medical providers with "Last Records Update" date. "Last Records Update" is an optional field for Medical Provider and can be enabled under Admin->Picklist Maintenance->Hidden Edit Form Fields

Medical Visits Report: This reports allows you to search/list medical visits globally. Filters include case open dates, case group, type, staff and visit type.

Treatment Report: This report shows treatment (visit) summaries for each listed case. Number of visits is shown for each of up to 8 different visit types. Cases can be filtered by group, type, status and staff.

SOL/Critical Deadline Reports

Critical Deadline Report: Lists critical deadlines in a selected date range in a text table. Columns include the case number, name, and type, the party the deadline applies to, the deadline type, due date and compliance date, the attorney and paralegal on the case, and any comments on the deadline. Parameters include the date range, case status (open, closed, or both), case type, whether to include critical deadlines that have been met, the deadline type, the staff member involved with the case, and whether to include mass tort cases. Note: this report does not list SOLs.

No Fault Report: Lists No Fault SOLs due before a selected number of days after the current date (including overdue ones) in a text table. Columns include the case number, name, type and status, insurance carrier, SOL deadline date, the number of days until the deadline date (or, if the deadline is overdue, the number of days past the deadline date), and the attorney, paralegal, and case manager. Parameters include the number of days, the staff member involved with the case, whether to include cases referred out or handled within your firm, and the firm office handling the case.

Notice of Claim Report: Lists Notice of Claim SOLs due in a selected date range in a text table. Columns include the case number and type, plaintiff's name, defendant's name, incident date, SOL deadline, date of compliance, and the attorney, case manager, and paralegal. Parameters include the case status (open, closed, or all), whether to include SOLs that have been met, whether to include mass tort cases, and the date range.

SOL Report: Lists SOLs in a text table. Almost every column is optional, and the selection of columns is one of the parameters. Other parameters include how the SOL deadline date range is selected, the date range itself, the staff involved with the case, the case group and type, whether to include SOLs with compliance or filing dates, whether to include cases referred out or handled within your firm, whether to include cases that have or have not been retained, whether to include mass tort cases, whether to limit the report results to only show the SOL with the earliest deadline date in each case, the SOL Type, and the case status (open, closed, or all). Note that this report can, depending on the SOL types chosen, include the information in the No Fault and Notice of Claim Reports.

SOL Report Simple:

Staff Management Reports

Attorney Performance Report: Lists the performance of staff members in a text report. Parameters include staff members and date range. Columns include the staff member's name, total number of cases, cases that were settled without a check, where the minimum value has not been set, how many case status changes have been entered, how many adjourned or cancelled appointments, how many cases have an overdue client contact, attorney file review, or supervisor file review. Clicking on any staff member's name opens a new tab with a list of all cases included in the report for that staff member.

Cases with Long Time in Status: Lists cases that have remained in their current status for an extended period of time. The results are listed in text tables, grouped by either the case attorney or case manager. Parameters include whether cases should be grouped by attorney or case manager, the staff member involved with the case, the case status, the maximum number of days a case can remain in its status before it appears in this report, whether the case is being handled in the firm or as a referral, and whether the case is open or closed.

Cases with No Recent Activity: This report lists cases that don't have recent activity (i.e. no notes added, no documents added, etc.). If multiple activity types are selected, the report will pull only those cases that don't have any of the selected activities.

Contact Rename Report: This report shows contacts that were renamed in the specified time frame. Previous and new name of the contact will be shown. The report can be filtered by users and contact types.

Created/Modified Contact Search: This report shows contacts that were created or edited in the specified time frame. The report can be filtered by contact types.

Incident Information Changed Report: This report shows cases where the incident information (date/state) was modified in the specified time frame. The report can be filtered by case group, type and staff.

Modified Notes Report: This reports shows notes that were modified in the specified time frame. Previous and new note will be shown. The report can be filtered by users, note types, case type and case status.

Negotiation Follow-Up: Report showing list of negotiations that have commenced (demand and/or offer made). Standard columns include demand amount, date of demand, offer amount, last negotiation note and others. The available filters are staff, case status, case group and case type.

Overdue Report: Lists cases where a regular check-in of some kind (contacting the client or reviewing the file) is overdue. Columns include the case number and type, plaintiff's name, case status and the number of days spent in that status, most recent note indicating the check-in with plaintiff occurred, number of days since that note, and most recent note of any type. Parameters include the type of overdue check-in (the options are Client Contact Overdue, File Review Overdue, and Supervisor File Review Overdue) and the staff member involved with the case.

Overdue Status Summary: Lists cases which have remained in their current status beyond the period set as the maximum number of days a case is expected to remain in that status. See Status Setup for details about the number of days a case is expected to remain in a status. Parameters include the case's state and case group, whether it is a mass tort, and which office is handling it. The columns are state, case status, maximum number of days a case is allowed to remain in that status, and the number of cases in that status which exceed the allowed number of days.

Overdue Tasks Report: Lists tasks that have not been completed on or before their due dates in a text table. Columns include the case number and name, task type, priority, due date, subject and description, requestor, and assignee. Parameters include the task assignee, requestor, and status, the date range of the due date, whether to include open or closed cases, and a text box in which you can enter language that must be contained in the Subject of the task.

Staff Activity Report: Lists case-related activities performed by staff members in a selected time period and creates an overall activity score (the Activity Index) based on how many activities were performed. Columns include the name of the staff member (linking to an individual listing of activities performed), the number of cases worked on, the number of case files visited, the number of documents generated, attached, or scanned, the number of notes created or modified, the number of file review and client contact notes created, the number of tasks created, modified, or completed, the number of negotiations created or modified, the number of settlements created or modified, the number of documents or notes deleted, and the overall activity index. Parameters include the time period, whether to include staff members with no activity in the report, and the staff members to include.

Staff Performance Report: This report is similar to Staff Performance Dashboard. For each staff member the report shows number of cases assigned and overdue tasks, client contacts, file reviews and supervisor file reviews.

User Login Report: This report shows user's logins and logouts in specified time range. Can be filtered by users.

Miscellaneous Reports

Suggestion Report: Lists suggestions for improvements to SmartAdvocate submitted by your firm within a selected date range. Columns include the suggestion date, subject, text, and creator. The only parameters are the start and end of the date range.

ViewStat Report (Quick Status Report): Provides a quick report of the detailed status of the selected case. The only parameter is the case number. Information provided includes case number, type and subtype, incident date, last status date and how long the case has been in that status, incident details, parties, assigned staff, critical deadlines, calendar, notes and more.

Case Statistics Report

The Case Statistics Report tells you what your firm did for the period you selected. Here are the parameters you can set:

'Days Back From' and 'Days Back To' - The Number of Days to include in the Report: The 'Days Back From' is the *furthest* number of days in the past you want to include in the report and the 'Days Back To' is the number of days closest to the *current* date you want to include. For example, 'Days Back From' could be 30 and 'Days Back To' could be 0 (zero). In the foregoing example, your report would include statistics from as far back as 30 days ago to today (today being zero). So, if today's date was November 12, 2018, and we used the same 30 and 0, respectively, our report would include statistics from October 13, 2018, to November 12, 2018.

Case Group and Case Type: You can have your report generate statistics for one or more individual Case Group(s) or All Case Groups and one or more individual Case Type(s) or all Case Types as defined in your system. (*Note – Although both Case Group and Case Type give you the option of selecting 'none,' more than likely you will be making a selection in those categories. 'None' is included so that you can, in rare circumstances, select that option where you may have cases in your system that do not have a defined Case Group and/or Case Type – most often the result of a conversion where no Group or Type were defined in your old system*)

Sign Up Statuses: Here you can select from among the Pre-sign Statuses defined in your system that you want the report to include, (i.e., those cases are being signed up).

Always Include: Here you can select from your available Advertisement Sources that you **always** want included in the report. The source(s) selected here will be included in the report even if no cases with this source were created. Other Sources will be included only if there is at least one case with that source.

Use Current Time as Start/End Time: Selecting 'Yes' will use the present time the report is run as the start time and end time for the report. For example, if 'Yes' is selected and the report is run at 10:00 am, it will include statistics covering 10:00 am from the date used for 'Days Back' to 10:00 am for the date used for 'Days To.' If 'No' is selected the system will use 12:00 midnight as the start and end time for the respective dates.

Referred/Referring Out Statuses: Here you can select statuses that indicate the case is being referred out.

Rejected Statuses: Here you can choose statuses that indicate that the case is rejected or being rejected.

Start of Project Date: Here you can designate a specific date that you want to include in your report. This may be useful for those situations where you have certain campaigns going and you want to determine how effective or successful the campaign is. Making this selection will show 'New Inquiries since the project started' (the date specified) in your report.

Don't Split by Case Group: If set to 'True,' your report will include a single number combining Signups or inquiries for all Case Groups. If set to 'False,' your report will give you the statistics broken down by Case Groups. In essence, 'False' gives you more granularity for your report.

Hide Individual Advertising Sources: If set to 'True,' the results of your advertising sources (advertisement campaigns) will not be displayed individually in your report. If set to 'False,' your report will show results for each specific Advertisement Source individually.

How to create a Referred-Out Firm Report using Case Browse

How to search for cases using UDFs

Make Use of the Client Contact Overdue Dashboards and Reports Video

Medical Provider Referral Report

The Settlement Forecast Report - Negotiations & Settlements

The Basics:

In SmartAdvocate, there are various tools to aid the Negotiation and Settlement process of your cases.

There are a handful of reports under Financial Reports for you and your firm to utilize in tracking outstanding fees, forecasted settlements, and more.

Case Settlement Values: Lists settlements reached in a selected time range. The results are listed in text tables, grouped by the attorney who reached the settlement.

Fees Outstanding: Lists cases with outstanding fees in a series of text tables, with each table associated with the attorney responsible for the settlement. Most columns are optional, and the selection of columns is one of the parameters. Other parameters include the attorney or case manager, whether to include open or closed cases, whether to include settlements that do not generate a fee, the case referral status, and the date range.

Settlement Forecast Report: Provides anticipated upcoming case settlements, based up the Expected Resolution Date field. (See Case Summary.) Note that if the Expected Resolution field is not filled out, this report will not populate for that case. Almost every column is optional, and the selection of columns is one of the parameters. Other parameters include date range, staff, and office ID (location). Columns include case number, name, and status, open date, case group, attorney, minimum value, expected resolution date, disbursement amount, projected fee, referral fee, and net fee.

Settlement Report: Lists settlements in a text table. Columns include the case number, case type, plaintiff name, the dates that the settlement was reached, the settlement release was sent to the plaintiff, the signed release was received from the plaintiff, and the signed release was sent to the insurance company, the amount of the settlement, the company being settled with, the case status and sub-status, and the comment on the case status. Parameters include the date range of the settlement, the case status and type, and whether to include open or closed cases. Most columns are optional, and the selection of columns is one of the parameters.

For an overview on more of the Financial Reports, jump to [Reports Overview](#)

Beyond Reports, SmartAdvocate Dashboards provides tools to help track Negotiations and Settlements of your cases - specifically the Negotiation Follow-Up Dashboard.

Negotiation Follow-Up: Displays information about the status of unresolved negotiations. The information includes the number of the associated case, the plaintiff who is the subject of the negotiations, the incident date and earliest SOL in the case, the number of days the case has spent in its current

status, the information about the company being negotiated with, the most recent negotiation date, demand, offer, and comments in the negotiation with the company, the last Negotiation note in the case, the staff member performing the negotiation, and icons for creating a new note and a new demand and offer in the negotiation.

For an overview on more useful Dashboards, jump to [Dashboards Overview](#)

SmartAdvocate Tips of the Week - Negotiations & Settlements

[The Settlement Forecast Report](#)

[The Continue Negotiations Feature](#)

Use the Settlement Forecast Report to show Projected Income

Enter and track Distribution Checks automatically on the Settlement Screen

Medical Provider - Bills Finalized and Don't Pay at Settlement Options

[Enter and track Distribution Checks automatically on the Settlement Screen](#)

Utilizing the "Bills Finalized" and "Don't Pay at Settlement" Options for Medical Providers

Use The Staff Activity Report To Keep Track Of And Monitor Staff Productivity

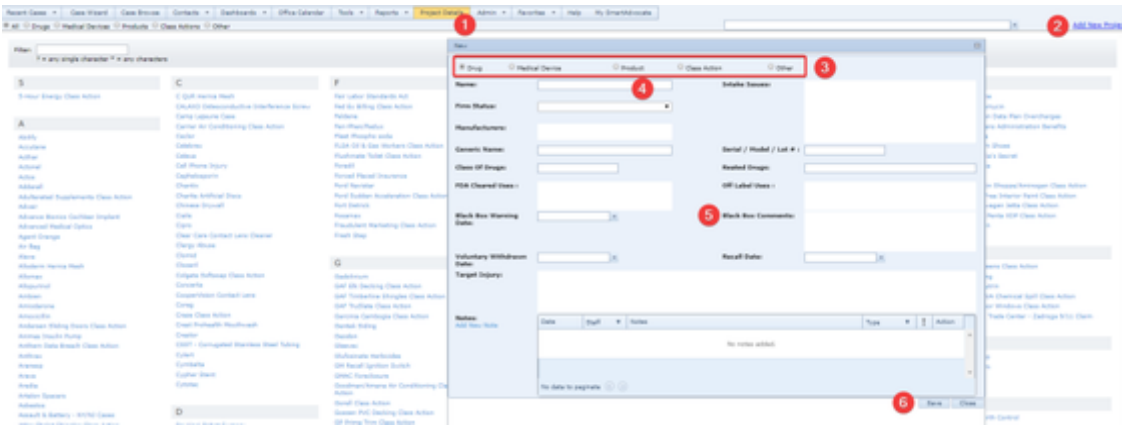
Project Details

Project Detail is used in the Intake process to help the Intake staff identify a specific product or issue that is being targeted and whether the plaintiff fits the profile to be included in the project. Project Details is primarily used for Mass Tort cases. The Project Detail will help the Intake staff quickly identify issues and pinpoint whether the potential client fits the profile of the case type, injuries, and potential liability for the Drug, Medical Device or Product being targeted.

To create a New Project Detail

(Note: The Case Type and Case Group for the target Drug, Medical Device, or Product should be created, if they do not already exist, before you create the Project Details.)

1. Select "Project Details" from the Top Tool Bar.
2. Click the "Add New Project" tab in the top right corner of your screen.
3. Click the check box for the item being targeted (Drug, Medical Device, Product, Class Action, Other).
4. Enter a name for this new Project Detail.



1. Enter the remaining Project Detail information as appropriate (see example in screen shot below). Note that some of the fields may change based on the item being targeted chosen.
2. Click the "Save" button in the lower right corner of your screen (or the "Update" button if you are editing an existing project detail).

Ability

Drug
 Medical Device
 Product
 Class Action
 Other

Name:

Firm Status:

Manufacturers:

Generic Name:

Class Of Drugs:

FDA Cleared Uses:

Black Box Warning Date:

Voluntary Withdrawn Date:

Target Injury:

Notes:

| Date | Staff | Notes | Type | Action |
|-----------------|-------|-------|------|--------|
| No notes added. | | | | |

Created at 10/22/2009 10:13:00 AM by - Modified at 11/20/2014 11:01:00 AM by

Update Close

1. In the Incident/Injury screen in Case Wizard, click the "Show Project Details" tab on the Incident/Injury screen to display information specific to this "Project" (i.e., Project Details as defined previously in steps 1 through 6 above).

Plaintiff

Add Plaintiff

Defendant

Incident/Injury

Source

Finish Wizard and Generate Case

Incident Details

Firm Status: **In House**

[Show Project Details](#)

Device Installed

State:

Date/Time:

Symptoms Began

State:

Date/Time:

Device Removed

State:

Date/Time:

Death Questions

Sub Type: **Bladder Cancer**

Drug Name:

Symptoms Began:

Medical Malpractice:

When did the decedent first begin taking ?

When did the decedent stop taking ?

Was decedent diagnosed with Bladder Cancer?

Yes No

If Yes, what was the date of diagnosis?

Did the decedent suffer from congestive heart failure?

Yes No

If Yes, what was the date of diagnosis?

Did the decedent ever smoked cigarettes?

Yes No Don't Know

If yes, when and how much did they smoke?

Was the brand or generic version of prescribed?

Brand Generic Unknown

What was the date of death of the decedent?

Was decedent taking at the time of his/her death?

Yes No

Do you have a copy of the Death Certificate?

Yes No

If Yes, what was the cause of death?

Did decedent have a will? Yes No Don't Know

Was an Administrator/Executor appointed to the Estate?

Yes No Don't Know

If Yes, were you appointed as Administrator/Executor?

Yes No

If No, what is the Administrator/Executor name & relationship to decedent?

What is your relationship to the decedent?

Did the decedent have a living spouse?

Yes No

Injury

Serious Injury

Select Plaintiff:

No Injury

Other Injuries:

1. The Project Details will be displayed (superimposed) on the Incident/Injury screen for information purposes only.

Plaintiff: (In House)

Add Plaintiff: **Target Injury:** BLADDER CANCER: only accepting cases where the potential client used the [] for at least 6 months and was diagnosed either (1) while taking [] or (2) within 3 years of discontinuing usage

Defendant: **Intake Issues:** ALL BLADDER CANCER CASES MUST BE EMAILED TO [] FOR REVIEW
INCIDENT DATE: Date of diagnosed injury

Incident/Injury: []

Source: Date/Time: [] AM

Finish Wizard and Generate Case: - Death Questions Sub Type: Bladder Cancer

Drug Name: [] Symptoms Began: [] Medical Malpractice: []

What was the date of death of the decedent? []

Was decedent taking [] at the time of his/her death?

Admin

The Admin tab allows a SmartAdvocate Administrator to customize the system according to the particular needs of your firm. SmartAdvocate is extremely configurable and allows the firm to modify many aspects of the system to fit your needs and ways of doing things. Only users with Administrator status can access the Admin tab. Individual user customizations are accomplished through User Preferences. *It is strongly recommended that the firm's SmartAdvocate administrator review the various settings in Admin in detail.* SmartAdvocate provides detailed data upon installation, however much of that information may not be relevant to your practice, thus requiring users to spend unnecessary time reviewing extraneous information. Additionally, data that may be essential to your practice may not be included in the information provided.

WorkPlans

WorkPlans are a valuable tool in SmartAdvocate for ensuring that your firm's work processes are consistent, well-defined, and repeatable. WorkPlans are collections of tasks and other necessary events, organized in a hierarchical tree structure, so that you can nest items (i.e., you can trigger certain items to become active only after another specific item is completed). You can set the due dates of individual tasks relative to other dates in the WorkPlan, or to relevant case dates; alternatively, you can prompt the user to determine the due date when the task becomes active. Tasks activated by a WorkPlan appear in the case summary screen along with other tasks and can be marked completed either in the case summary screen or the WorkPlan screen. You can also set WorkPlan items to trigger certain actions, like changing the case status or generating documents. In this way, you can direct the entire workflow of a case by using a well-designed WorkPlan (according to the needs and practices of your particular firm).

WorkPlan Management

The WorkPlan Management page allows you to view, edit, and record the descriptive details of WorkPlans in the SmartAdvocate system. This is also the only page where new WorkPlans can be created.

The Structure of This Page

| Name | Description | Special Notes | Creation Date | Modify Date | Actions |
|--|--|---------------|---------------|-------------|---------|
| *Sample Work Plan | | | 4/27/2017 | | [Icons] |
| 50 H Municipal Hearing Plan | 50 H Municipal Hearing Plan | | 1/1/2014 | 1/25/2014 | [Icons] |
| 50H hearing - PA | | | 5/26/2014 | 10/19/2016 | [Icons] |
| 50H Municipal Hearing Plan | 50H Municipal Hearing Plan | | 1/25/2014 | 1/26/2017 | [Icons] |
| Arbitration | test workplan | | 5/1/2015 | 10/19/2016 | [Icons] |
| Answer Received Plan - Auto Accident | Answer Received Plan - Auto Accident | | 1/25/2014 | 1/25/2014 | [Icons] |
| Answer Received Plan - General Negligence | Answer Received Plan - General Negligence | | 1/25/2014 | 1/25/2014 | [Icons] |
| Answer Received Plan - Intentional Tort | Answer Received Plan - Intentional Tort | | 1/25/2014 | 1/25/2014 | [Icons] |
| Answer Received Plan - Medical Malpractice | Answer Received Plan - Medical Malpractice | | 1/25/2014 | 1/25/2014 | [Icons] |
| Arbitration Plan | Arbitration Plan | | 1/25/2014 | | [Icons] |
| Arbitration Plan - No Fault | Arbitration Plan - No Fault | | 1/26/2014 | 1/26/2014 | [Icons] |
| Arbitration Plan - SUIH | Arbitration Plan - SUIH | | 1/26/2014 | 1/26/2014 | [Icons] |
| Arbitration Plan - UN/SUIH | Arbitration Plan - UN/SUIH | | 1/26/2014 | 1/26/2014 | [Icons] |
| Auto Accident - New Case Opening Plan | Auto Accident - New Case Opening Plan | Null | 1/25/2014 | 1/25/2014 | [Icons] |
| Auto Accident - New Case | New Case Opening/Pre Litigation | | | | [Icons] |

1. New WorkPlan button. Used to add a new WorkPlan to the case file. See [Adding a WorkPlan](#).
2. WorkPlan Administration table. Contains the details of WorkPlans and allows various actions to be performed on them. See [WorkPlan Administration Table](#).

WorkPlan Administration Table

The WorkPlan Administration table is where the descriptive details of WorkPlans are stored. Each row of the table represents an individual WorkPlan. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The WorkPlan Administration table contains the following columns:

| Name | Description | Special Notes | Creation Date | Modify Date | Actions |
|--------------------------------------|--------------------------------------|---------------|---------------|-------------|---------|
| *Sample Work Plan | | | 4/27/2017 | | [Icons] |
| 50 H Municipal hearing Plan | 50 H Municipal hearing Plan | | 1/1/2014 | 1/25/2014 | [Icons] |
| 50H hearing - PA | | | 5/26/2014 | 10/19/2016 | [Icons] |
| 50H Municipal hearing Plan | 50H Municipal hearing Plan | | 1/25/2014 | 1/26/2017 | [Icons] |
| Arbitration | test workplan | | 5/1/2015 | 10/19/2016 | [Icons] |
| Answer Received Plan - Auto Accident | Answer Received Plan - Auto Accident | | 1/25/2014 | 1/25/2014 | [Icons] |

1. Name. The name of the WorkPlan, pulled from the Add/Edit WorkPlan Panel.

2. Description. The description of the WorkPlan, pulled from the Add/Edit WorkPlan Panel.
3. Special Notes. Any special notes about the WorkPlan, pulled from the Add/Edit WorkPlan Panel.
4. Creation Date. The date on which the WorkPlan was created.
5. Modify Date. The date on which the WorkPlan was last modified.
6. Action. Icons to Edit, Open, Copy, or Delete a WorkPlan.

Editing WorkPlan Details

To edit the details (Name, Description and Special Notes only) of a WorkPlan:


Click the [Edit icon](#) in the Actions column of the row representing the WorkPlan you wish to edit. This will bring up an Add/Edit panel for WorkPlans, with the existing information filled in.

Fill the fields in with your desired information. See [The Add/Edit WorkPlan Panel](#) for details about the fields.

Click Save to save the changes and close the panel.


If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Editing the Contents of the WorkPlan

To edit the contents of a WorkPlan, click the WorkPlan icon () in the Actions column of the row representing the WorkPlan the contents you wish to edit. This will bring up the [WorkPlan Editing](#) page for that WorkPlan; see that chapter for instructions on using the WorkPlan Editing interface to edit the WorkPlan.

Copying a WorkPlan

You may wish to create a new WorkPlan based on an existing one. To copy a WorkPlan:

1. Click the [Copy icon](#) () in the Actions column of the row representing the WorkPlan you wish to copy. This will bring up a panel with only one field, for the name of the new WorkPlan.
2. Fill in the desired name, then click OK to copy the WorkPlan. The new WorkPlan will have the same items and structure as the WorkPlan that was copied. You can then make any desired changes to the new WorkPlan.
3. If you decide you do not wish to copy the WorkPlan, click Cancel instead of clicking OK to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.


Deleting a WorkPlan

To delete a WorkPlan:

1. Click the [Delete icon](#) in the Actions column of the row representing the WorkPlan you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
 2. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the WorkPlan, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

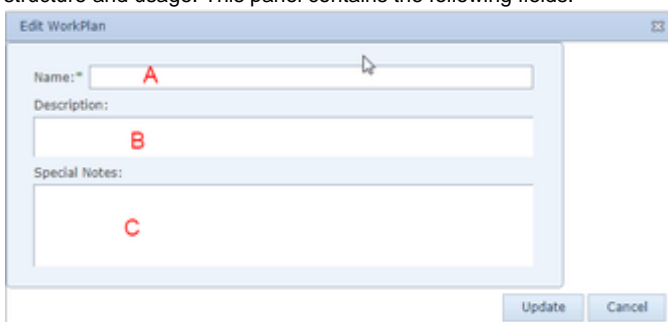
Adding a WorkPlan

To add a new WorkPlan:

1. Click the New WorkPlan button. This will bring up an Add/Edit panel for WorkPlans, completely blank.
 2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Panel](#) for details about the fields.
 3. Click Update to save the WorkPlan and close the panel. To edit the contents of the new WorkPlan, click the WorkPlan icon () in the Actions column of the row representing the new WorkPlan.
- If you decide you do not wish to save the WorkPlan, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit WorkPlan Panel

The Add/Edit WorkPlan Panel allows you to fill in the descriptive details of a WorkPlan. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



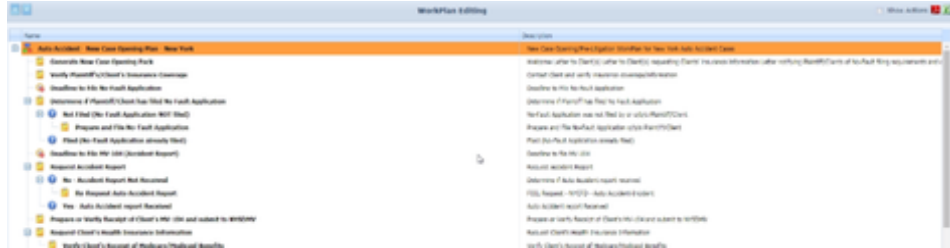
1. Name: The name of the WorkPlan.

2. Description: The description of the WorkPlan. The description will not appear in the WorkPlan once it is inserted in a case; however, it will be visible in the dropdown when selecting a WorkPlan to manually insert in a case on the WorkPlans case page.
3. Special Notes: Any special notes about the WorkPlan.

WorkPlan Editing

The WorkPlan Editing page allows you to manage the contents of a WorkPlan so that it can be inserted into your cases. Before creating a WorkPlan, it is *recommended that you take time, outside of the SmartAdvocate system, to map out the set of tasks and other events that you want to consistently enforce with a WorkPlan*. You should particularly consider how deadlines should be set for each item, and whether there are any sequences of events in which a later item should not be completed or considered until the prior item is first completed. Once you have planned out the intended structure of the WorkPlan, use the WorkPlan Editing page to implement that structure.


The WorkPlan Editing page and the WorkPlans case page have very similar structures and interfaces; however, because the WorkPlan Editing page is for creating the WorkPlan prior to inserting it into a particular case, there is no way to mark an item complete, no distinction between inactive and active items, and no unintended effects when items are added, moved, edited, or deleted. In general, editing WorkPlans on this page prior to inserting them in a case, rather than making changes on the WorkPlans case page after they have been inserted, is considered better practice.



WorkPlan Structure

WorkPlan items are the building blocks of WorkPlans. They represent tasks that must be completed, appointments that must be scheduled, critical deadlines, or decision branches that allow you to determine which of multiple possible sections of a WorkPlan should be implemented given the particular situation of the case. In general, the best way of creating and managing items is through the [Item Templates](#) administrative page. Items created on that page can be quickly and easily added to WorkPlans on this page. However, it is also possible to edit an item directly on this page; once you have edited an item on this page, you can even save it as an item template if you wish.

Items that have been added to WorkPlans are arranged in a hierarchical system, like an organization chart or a computer file structure. Every item has at

least one parent item, except for the top-level item, representing the WorkPlan itself and indicated by a WorkPlan icon (). Items with at least one child have a small plus/minus icon next to them; clicking this icon will switch between displaying the item's children and hiding them. When the WorkPlan is inserted in the case, the child items will remain inactive until the parent item has been completed. This means that the task will not be assigned, the appointment will not be scheduled, or the critical deadline will not be set, until the parent item is complete. (Decision items are a partial exception to this rule; see [Decisions](#).) For this reason, the organization of the items in a WorkPlan is essential to properly managing the process the plan represents. It would be possible to put every item in a WorkPlan on the same level, with only the top-level item as a parent, but this would simply cause every item to activate as soon as the WorkPlan was inserted, which would likely be overwhelming to your staff and would eliminate the value of structuring your work process in advance.

Moving Items Within the WorkPlan

To change an item's position in the WorkPlan hierarchy, click on the item and, holding the left mouse button, drag the item over to the desired parent item and release the mouse. The item should become one of the children of the desired parent item. Any children of the item will remain the children of that item, putting them two levels below the new parent item. (You cannot move the top-level item, and you cannot directly switch a parent item with one of its children.)

To move an item up or down in the WorkPlan while still remaining at the same level with the same parent, click either the up or down arrow button to the upper left of the WorkPlan. The ordering of sibling items within a level is purely aesthetic; there is no practical effect to moving the item up or down, so it is entirely a matter of what looks best to you.

Adding Items to a WorkPlan

To add an item to a WorkPlan, right-click the item you wish to make the parent of the new item. Among the items in the right-click menu are Add Task, Add Appointment, Add Critical Deadline, and Add Decision. If you have already created a template for the item you want to add, click whichever of these items matches the item you want to add, which will bring up a panel containing a table of templates; deselect the Open element [...] checkbox by clicking it, then find the template you want to use, and click the check-mark icon in that row. The desired item will be added at the location in the plan you selected. If you have not already created the item template, click any of the four options and then click the Add Empty Item button in the lower right of the panel that appears. A blank item will be added at the location you selected, which will be named "New Element (Please rename)". Right click on the new element and click on Edit. A panel for editing the item will open. See [The Add/Edit WorkPlan Item Template Panel](#) for a description of the panel and how to design the new item. When you are finished, you may click the OK button to save the changes to the item, or you may click the OK & Save as Template button to save the changes to the item and also save the item itself as a new item template. You may instead click the Cancel button or the white X at the upper right of the panel to cancel any changes; however, the blank item will still be present in the WorkPlan and will need to be deleted. Note that no warning will appear before the item is deleted and once an item is deleted, it is permanently removed and will need to be recreated if necessary.

Editing an Item in a WorkPlan

To edit an item once it has been added to a WorkPlan, right-click the item, then click Edit. This will bring up a panel for editing the item. See [The Add/Edit WorkPlan Item Template Panel](#) for a description of the panel and how to edit the item. When you are finished, you may click the OK button to save the changes to the item, or you may click the OK & Save as Template button to save the changes to the item and also save the item itself as a new item template. You may instead click the Cancel button or the white X at the upper right of the panel to cancel any changes.

You can add an action to a WorkPlan item that will be automatically initiated or performed by the SmartAdvocate system either when the item becomes active or is completed. This can be done in the normal course of editing the item, but there is also a shortcut that will bring you directly to the Add/Edit

panel for a new WorkPlan item action. To use the shortcut, right-click the item you wish to add the action to, then click the Add New Action option. You can then fill out the panel that appears as usual. Note that after adding the new action, you will be returned to [The Add/Edit WorkPlan Item Template Panel](#), and will have to click OK to fully save the new action in the item.

Deleting an Item from a WorkPlan

To delete an item from a WorkPlan, right-click the item you wish to delete, then click either Delete with sub-items or Remove Item. If you click Delete with sub-items, all of the children of the item you chose to delete will also be deleted. If you click Remove Item, all of the children of the item you chose to delete will move up one level (which means they will be children of the deleted item's parent).

Adding an Entire WorkPlan to Another WorkPlan

You can insert the entire contents of some other existing WorkPlan into the WorkPlan, at the location of a selected item. The selected item will take the place of the top-level item of the inserted WorkPlan; all the children of the inserted WorkPlan's top-level item will become the children of the selected item. To do so, right-click the item where you wish to insert the WorkPlan, then select Insert WorkPlan. A small panel will appear with a [Dropdown](#) allowing you to select the WorkPlan you want to insert. You can, in fact, insert the same WorkPlan you are currently editing, but this may yield inconsistent results and is generally not recommended.

WorkPlan Visibility Options

To see the actions that are attached to each item in a WorkPlan, select the Show Actions checkbox to the upper right of the WorkPlan. Deselect the checkbox to make the actions invisible again. The actions will be visible in green, positioned as though they were children of the item that contains them. However, actions cannot be manipulated like items in this interface. The only option you will have for affecting an action when you right-click it is Delete, which will delete it from the item containing it. Any other changes you wish to make to an action can only be made by editing the item that contains it and clicking the WorkPlan Item Actions tab.

You can simultaneously hide all children of all items by right-clicking any item and clicking Collapse All. You can simultaneously display all children of all items by right-clicking any item and clicking Expand All.

Decisions

Decisions behave slightly differently from any other item in a WorkPlan. A decision contains various decision options, and a decision is completed by marking any one of the decision options as complete. This is used to create a branching structure for your WorkPlan, where different sets of items could be invoked depending on some circumstance of the case. For example, you might have a decision for whether any plaintiff in the case died in the case incident. If not, no additional items are activated, but if so, some sequence of items relating to Surrogate's Court becomes active. Decision groups can be as complicated or simple as you wish.

A decision in a WorkPlan has two parts. One is the decision question, which is an item like a task or appointment. The decision question can be edited like any appointment. However, you cannot add any other item directly to the decision question. If you right-click the decision question, the only thing you can add to it is a decision option, which is one of the possible answers to the decision question. You may add as many decision options as you wish, and as few as two (you could actually have fewer, but then the decision would be useless). Editing a decision option only offers one field: the text of the option. But you can add items to a decision option just as with any non-decision item.

When a decision becomes active in a case, so do all of the options of that decision. (This is the only exception to the general rule that children of incomplete items are not active.) The decision question appears in the [Case Summary](#) page as a task and trying to mark it completed will automatically bring you to the WorkPlans page for that case; it will not yet mark the decision completed. To mark the decision completed, you must mark one of the options of that decision completed from the WorkPlans page. Doing so will also mark the decision question completed and activate all of the children of the option that was marked completed. However, it will not activate any of the children of any of the other options; if that option is not relevant to the case, none of the subsequent items should need to be completed, so they should properly remain inactive for the entire duration of the case. (You may mark more than one option of the same decision completed, if multiple options all apply. This will activate the children of the completed options, and not the children of the options that have not been marked completed, as expected.)

Item Templates

The Item Templates page allows you to create WorkPlan item templates. WorkPlan items are the essential building blocks of WorkPlans; they are the individual requirements that must be completed to move to subsequent WorkPlan items. Item templates allow you to define the specific details of items that can be included easily in any WorkPlan. For commonly used tasks, deadlines, and appointments, defining them as templates can save significant time.

The Structure of This Page

| Name | Type | Category | Priority | Description | Actions |
|---|-------------|------------------|----------|-------------|-----------------|
| SDH Hearing | Appointment | SDH Hearing | Normal | | [Edit] [Delete] |
| SDH Physical | Appointment | DHE | Normal | | [Edit] [Delete] |
| Appeal Argument/Submission | Appointment | Appeal | Normal | | [Edit] [Delete] |
| Appeal Brief Deadline | Appointment | Appeal | Normal | | [Edit] [Delete] |
| Appointment | Appointment | Appointment | Normal | | [Edit] [Delete] |
| Arbitration | Appointment | Arbitration | Normal | | [Edit] [Delete] |
| Arbitration - No Fault | Appointment | Arbitration | Normal | | [Edit] [Delete] |
| Arbitration - UN/UDH | Appointment | Arbitration | Normal | | [Edit] [Delete] |
| CAMP Conference | Appointment | Court Appearance | Normal | | [Edit] [Delete] |
| Case Evaluation - For Settlement Conference | Appointment | Court Appearance | Normal | | [Edit] [Delete] |
| Case Inventory Review | Appointment | Review | Normal | | [Edit] [Delete] |
| Certification Conference | Appointment | Court Appearance | Normal | | [Edit] [Delete] |
| Citation Return Date | Appointment | Court Appearance | Normal | | [Edit] [Delete] |
| Client Statement | Appointment | Deposition | Normal | | [Edit] [Delete] |
| Compliance Conference | Appointment | Court Appearance | Normal | | [Edit] [Delete] |
| Conference Call | Appointment | Phone Call | Normal | | [Edit] [Delete] |













1. New WorkPlan Item Template button: Used to add a new item template to the SmartAdvocate system. See [Adding an Item Template](#).
2. WorkPlan Item Template Administration table: Contains the item template details and allows various actions to be performed on them. See [WorkPlan Item Template Administration Table](#).

WorkPlan Item Template Administration Table

The WorkPlan Item Template Administration table is where the details of item templates are stored. Each row of the table represents an individual template. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The WorkPlan Item Template Administration table contains the following columns:

| Name | Type | Category | Priority | Description | Actions |
|----------------------------|-------------|-------------|----------|-------------|---|
| A | B | C | D | E | F |
| 503(i) Hearing | Appointment | | Normal | |   |
| 503(i) Physical | Appointment | PRE | Normal | |   |
| Appeal Argument/Submission | Appointment | Appeal | Normal | |   |
| Appeal Brief Deadline | Appointment | Appeal | Normal | |   |
| Appointment | Appointment | Appointment | Normal | |   |
| Arbitration | Appointment | Arbitration | Normal | |   |

1. Name: The name of the item, pulled from the Add/Edit WorkPlan Item Template Panel.
2. Type: The type of event represented and created by the item, pulled from the Add/Edit WorkPlan Item Template Panel.
3. Category: The type of the item, within the event type (e.g.: the appointment type or the critical deadline type), pulled from the Add/Edit WorkPlan Item Template Panel.
4. Priority: The priority level of the item, pulled from the Add/Edit WorkPlan Item Template Panel.
5. Description: The description of the item, pulled from the Add/Edit WorkPlan Item Template Panel.
6. Action: Edit and Delete icons.

Editing an Item Template

To edit an item template:

1. Click the [Edit icon](#) in the Action column of the row representing the template you wish to edit. This will bring up an Add/Edit panel for item templates, with the existing information filled in.
 2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Item Template Panel](#) for details about the fields.
 3. Click Update to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Item Template

To delete an item template:

1. Click the [Delete icon](#) in the Action column of the row representing the template you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
 2. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the template, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Item Template

To add a new item template:

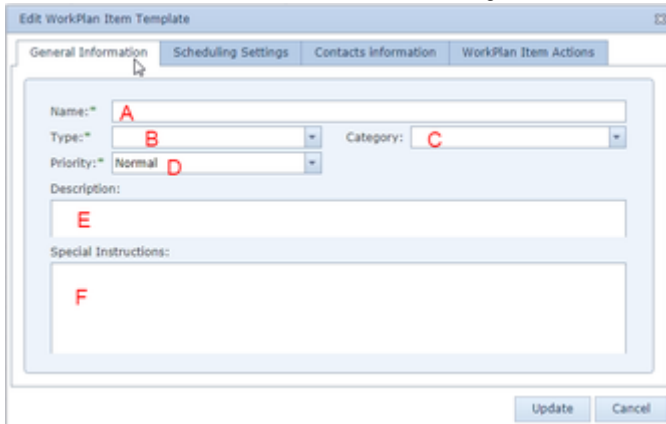
1. Click the New WorkPlan Item Template button. This will bring up an Add/Edit panel for item templates, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Item Template Panel](#) for details about the fields.
 3. Click Update to save the template and close the panel.
- If you decide you do not wish to save the template, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit WorkPlan Item Template Panel

The Add/Edit WorkPlan Item Template Panel allows you to fill in the details of an item template. The information in this panel is divided into four tabs: **General Information**, **Scheduling Settings**, **Contacts information**, and **WorkPlan Item Actions**. The headings of the tabs are always visible at the top of the panel, but only one tab's contents are visible at a time; click the heading of the tab you wish to access to bring up that tab's information. See Add/Edit

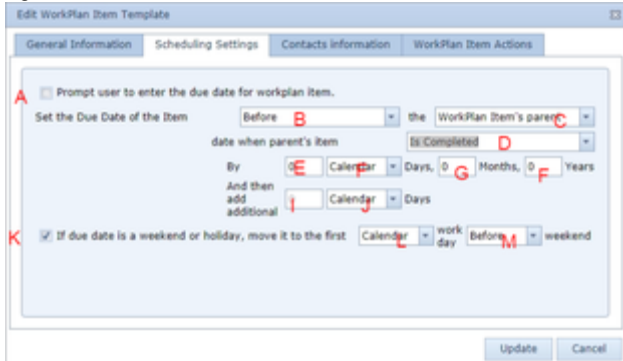
Panels for general information about panel structure and usage.

The **General Information tab** contains the following fields:



1. Name: The name of the item.
2. Type: A Dropdown, listing the type of event represented and created by the item. The available options are Appointment, Critical Deadline, Decision, and Task.
3. Category: A Dropdown, listing the type of the item within the event type (e.g.: the appointment type or critical deadline type). The Dropdown is empty if Type contains Decision; the Category will be recorded as "No category".
4. Priority: A Dropdown, listing the priority level of the item. It cannot be left blank. The available options are Critical, High, Normal, or Low.
5. Description: A description of the item.
6. Special Instructions: Any special instructions for the item.

The **Scheduling Settings tab** contains a number of fields which are used together to determine the due date of the item. Either the date is entered manually by the user on the [WorkPlans](#) case page, or the date is calculated by adding or subtracting various quantities of time from a date that is significant for either the case or the WorkPlan item itself. The tab contains the following fields:



1. Prompt user to enter the due date [...]: Checkbox which, if selected, causes the item to have no due date when first activated; users who visit the WorkPlans page in the case containing the item will be prompted to set the due date manually. If this field is selected, all other fields in the Scheduling Settings tab are ignored.
2. Set the Due Date [...] [Direction]: Dropdown requiring a selection of whether to set the items due date before, equal to, or after the triggering date. One of the choices must be selected.
3. Set the Due Date [...] [Date]: Dropdown requiring a selection of the trigger date to set the items due date relative to. The available options are Item Entered Date, Case Created Date, incident Date (DOI), or WorkPlan Item's Parent. One of the choices must be selected.
4. date when parent's item: Dropdown permitting a selection of the date, relative to the item's parent, to which to set the item's date
5. [By] Days [Number]: The number of days added to or subtracted from the significant date as part of the date calculation. This field does not appear if Set the Due Date is set to "Equal to".
6. [By] Days [Type]: Dropdown requiring a selection of whether the days added or subtracted in [By] days [Number] are simply calendar days or exclude federal or state holidays and weekends in the calculation. The available options are Calendar, Federal, or State. This field does not appear if Set the Due Date is set to "Equal to".
7. [By] Months: The number of months added to or subtracted from the significant date as part of the due date calculation.
8. [By] Years: The number of years added to or subtracted from the significant date as part of the due date calculation.
9. [Additional] Days [Number]: The number of days added to the significant date as part of the due date calculation.
10. [Additional] Days [Type]: Dropdown requiring a selection of whether the days added in [Additional] Days [Number] are simply calendar days or exclude federal or state holidays and weekends in the calculation. The available options are Calendar, Federal, or State.
11. If due date is a weekend [...]: Checkbox to determine whether to shift a due date if it would otherwise fall on a weekend.
12. work day: Dropdown to choose whether the due date should be shifted to avoid only weekends, or also federal or state holidays. The available options are Calendar, Federal, or State.
13. Weekend: Dropdown requiring a choice whether the due date should be shifted backward or forward. The available options are Before and After.

The **Contacts information tab** is used to select the staff member or members responsible for completing the item. The tab contains only a table listing relevant staff members or case roles; use the New Contact button to add staff members or case roles to specify as the contacts who are responsible for

the item (or relevant in other ways). The Add/Edit panel that appears when using the New Contact button or editing a row of the table contains the following fields:

1. [...] contact type: Radio button requiring a choice whether the relevant staff member is selected by their role on the case or as a specific person.
2. [Contact]: Dropdown requiring a choice of the role or staff member relevant to the item, depending on which type is chosen under "contact type".
3. Is responsible for the WorkPlan item: Checkbox that, if checked, causes the staff member or role to be listed as responsible for completing the item.
4. Is acting as assigner of WorkPlan item: Checkbox that, if checked, lists the staff member as the requestor of the item (for tasks only).
5. Check to notify on status changes: Checkbox that, if selected, causes the staff member to receive automatic notifications when the status of the item changes.

The **WorkPlan Item Actions tab** is used to create actions that will automatically be initiated or performed by the SmartAdvocate system either when the item becomes active or is completed. The tab contains only a table listing the actions; use the New Action button to add new actions. The Add/Edit panel that appears when using the New Action button or editing a row of the table contains two tabs, General Information and a second tab whose title and content depends on the selected action type (until an action type is selected, the second tab is not visible at all).

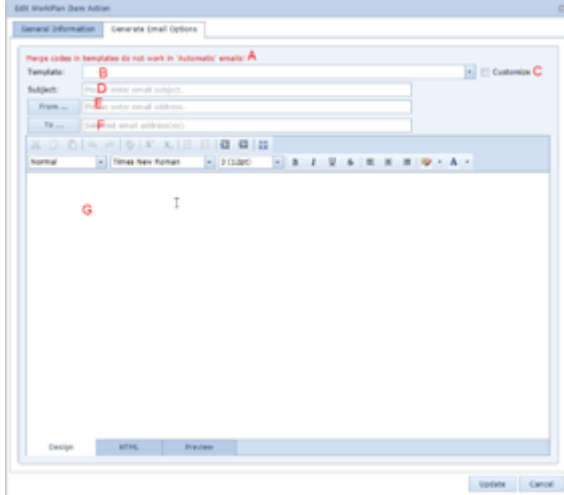
The **General Information tab** contains the following fields:

1. Name: The name of the action. The contents of this field are automatically entered based upon the Action Type chosen but can be edited. Because the name will change if the Action Type or other fields change, it is recommended that this field be edited last.
2. Action Type: Dropdown requiring that the type of action be chosen. The options are Generate Document, Generate Email, Generate Note, Case Action, Insert WorkPlan, or Send Text Message.
3. Priority: Dropdown requiring that the priority level of the action be chosen. The options are Critical, High, Normal, or Low.
4. Action is performed: Radio button, to choose whether the action is entirely performed by the SmartAdvocate system or only initiated by the system, requiring manual input to complete. The options are Automatic or Manually. This field cannot be edited if Generate Document, Case Action, or Insert WorkPlan is selected.
5. Action is executed: Radio button, to choose whether the action is performed/initiated when the item becomes active (i.e.: when its parent item is completed) or when the item is completed. The options are When WorkPlan items becomes active, or When WorkPlan item is completed. This field cannot be edited if Generate Document is selected.
6. Completes the WorkPlan Item?: Checkbox which, if selected, the completion of the action also causes the item to be marked as completed.
7. Description: The description of the action.

If Generate Document is selected in Action Type, the second tab is Generate Document Options, which contains the following fields:

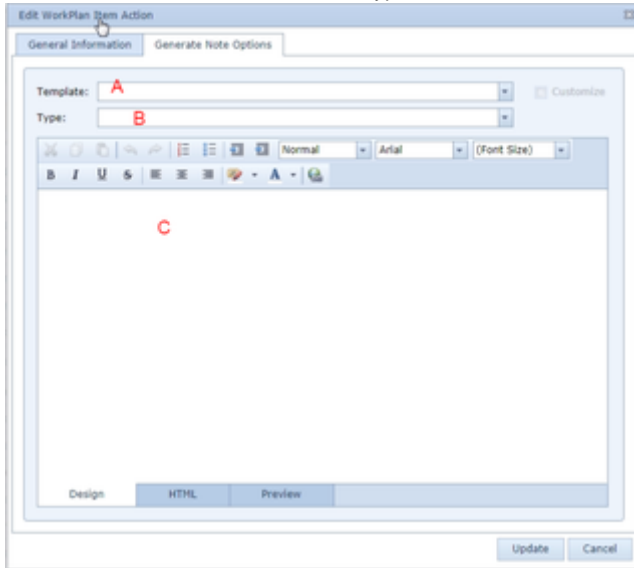
1. Please choose the document template: Dropdown allowing the choice of which document template will be used to generate a document when the action is triggered.
2. Please add comments to the document generation: Any comments that should be included when the document is generated.

If Generate Email is selected in Action Type, the second tab is Generate Email Options, which contains the following fields:



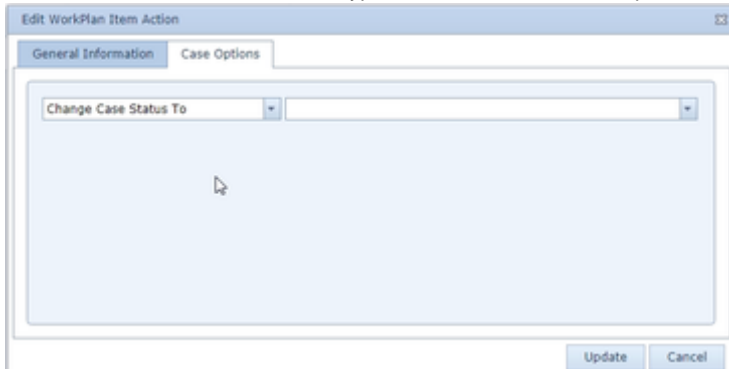
1. A warning is provided to caution the user that merge codes in templates will not work in these "Automatic" emails.
2. Template: Dropdown permitting you to choose which email template will be generated and sent when the action is triggered.
3. Customize: Checkbox is used to determine if the content of the email template should be edited.
4. Subject: The "Subject" of the email. If there is a selection in Template, and Customize is not selected, this field cannot be edited.
5. From: The sender of the email in the From field. Clicking the From button next to this field will bring up a panel allowing you to automatically set yourself, any staff member, any role in the case, or the user at the time the email is generated as the sender of the email.
6. To: The recipients of the email in the To field. Clicking the To button next to this field will bring up a panel allowing you to automatically add yourself, any staff member, any role in the case, any contact in the SmartAdvocate system, the user at the time the email is generated, the primary plaintiff, or the primary defendant to the list of recipients of the email.
7. [Body]: The body of the email. If there is a selection in Template and Customize is not selected, this field cannot be edited.

If Generate Note is selected in Action Type, the second tab is Generate Note Options, which contains the following fields:



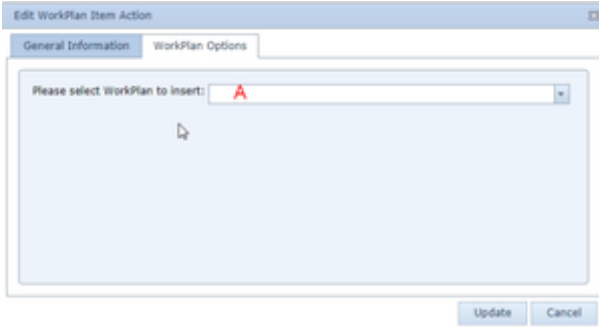
1. Template: Dropdown allowing you to choose the template upon which the note will be based.
2. Type: Dropdown requiring you to choose the note type.
3. Enter the note text.

If Case Action is selected in Action Type, the second tab is Case Options, which contains the following fields:



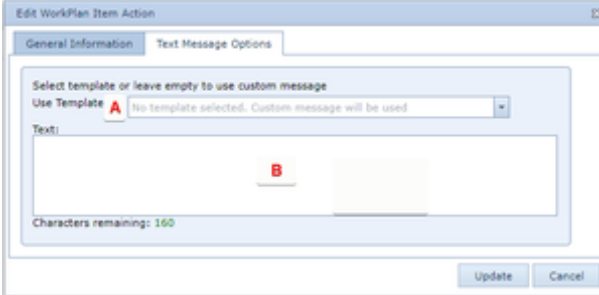
1. [Effect]: Dropdown permitting you to choose the effect of the action on the case file. The only option is Change Case Status To.
2. [Options]: Dropdown permitting you to choose the status to which the case will change. If additional options are added to [Effect], the contents of this dropdown may vary.

If Insert Workplan is selected in Action Type, the second tab is WorkPlan Options, which contains the following field:



1. Please select WorkPlan to insert. Dropdown permitting you to choose the WorkPlan whose contents will be automatically inserted, with this item replacing the top-level parent of the WorkPlan, when the action is triggered.

If Send Text Message is selected in Action Type, the second tab is Text Message Options, which contain the following field:



















1. Select template or leave empty [...]: Dropdown allowing you to choose the template upon which the text will be based. If no template is chosen you will be required to insert the context of the text manually.
2. Enter the content of the text. This field will only be editable if no text template has been chosen.

WorkPlan Assignments

The WorkPlan Assignments page allows you to create automatic assignment rules for WorkPlans. Automatic assignment rules cause WorkPlans to be inserted in cases at a predetermined phase of the case and can be customized further to only be used in a subset of cases, based on the case type, state, and/or firm office connected to the case. Assignment rules are essential tools in the use of WorkPlans, as they ensure that WorkPlans are applied consistently and automatically at the appropriate point in your cases.

The Structure of This Page

| New WorkPlan Assignment A | | | | |
|--|--------------------------------|--------------|-------------------------------------|---|
| WorkPlan Assignment Administration | | | | |
| Drag a column header here to group by that column | | | | |
| | Rule Name | Date Created | Enabled | Actions |
| <input type="checkbox"/> | Auto LR | 12/19/2016 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | Initial Steps | 4/27/2016 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | New Case Open Mail | 4/6/2017 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | New Case Work Plan | 3/5/2017 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | No response from client | 4/14/2018 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | Send out Non-Engagement Letter | 11/11/2017 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | Status shift | 5/18/2017 | <input checked="" type="checkbox"/> |   |
| <input type="checkbox"/> | Total Prep | 12/18/2016 | <input checked="" type="checkbox"/> |   |

1. New WorkPlan Assignment button: Used to add a new WorkPlan assignment rule to the SmartAdvocate system. See [Adding a WorkPlan Assignment Rule](#).
2. WorkPlan Assignment Administration table: Contains the assignment rule details and allows various actions to be performed on them. See [WorkPlan Assignment Administration Table](#).

WorkPlan Assignment Administration Table

The WorkPlan Assignment Administration table is where the details of WorkPlan assignment rules are stored. Each row of the table represents an individual rule. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The WorkPlan Assignment Administration table contains the following columns:

| | Rule Name | Date Created | Enabled | Actions |
|--------------------------|--------------------------------|--------------|-------------------------------------|---------|
| <input type="checkbox"/> | Initial UR | 12/18/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Initial Status | 6/27/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | New Case Open Work | 6/19/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | New Case Work Plan | 3/1/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | No engagement from client | 6/16/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Send out Non-Engagement Letter | 12/11/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Status UR | 5/18/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Trial Prep | 12/18/2016 | <input checked="" type="checkbox"/> | |

1. [column with checkbox heading]. Checkbox selector.
2. Rule Name. The name of the assignment rule.
3. Date Created. The date the rule was initially created. This field is automatically set at creation of the rule and cannot be edited.
4. Enabled. Checkbox indicating whether the rule is in use or has been (temporarily) deactivated. The box is automatically checked (meaning the rule is enabled) at creation but can be unchecked to deactivate the rule.
5. Action. Edit and Delete icons.

Editing a WorkPlan Assignment Rule

To edit a WorkPlan assignment rule:

1. Right-click anywhere in the row representing the rule you wish to edit. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the rule you wish to edit. This will bring up an Add/Edit panel for WorkPlan assignment rules, with the existing information filled in. Skip to step C.
 2. Click the Edit Rule option in the menu. This will bring up an Add/Edit panel for WorkPlan assignment rules, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Assignment Rule Panel](#) for details about the fields.
 4. Click Update to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a WorkPlan Assignment Rule

To delete a WorkPlan assignment rule:

1. Right-click anywhere in the row representing the rule you wish to delete. This will bring up a menu of options.
- Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the rule you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step C.
 1. Click the Delete Rule option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 2. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the rule, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a WorkPlan Assignment Rule

To add a new WorkPlan assignment rule:

1. Click the New WorkPlan Assignment button. This will bring up an Add/Edit panel for WorkPlan assignment rules, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Assignment Rule Panel](#) for details about the fields.
3. Click Update to save the rule and close the panel.
 - If you decide you do not wish to save the rule, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Disabling and Enabling a WorkPlan Assignment Rule

You can disable a WorkPlan assignment rule without deleting it. This will prevent it from being applied to any cases, but still allow you to re-enable it later if it becomes important again, without having to recreate it. To disable or enable a WorkPlan assignment rule:

1. Right-click anywhere in the row representing the rule you wish to delete. This will bring up a menu of options.
2. To disable an enabled rule, click the Disable Rule option in the menu. To re-enable a disabled rule, click the Enable Rule option in the menu.

The Add/Edit WorkPlan Assignment Rule Panel

The Add/Edit WorkPlan Assignment Rule Panel allows you to fill in the details of a WorkPlan assignment rule. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. [Name]: The name of the rule.
2. Assign the selected workplan(s) to the case: Checkbox-select dropdown, which requires you to choose the WorkPlans that the rule will cause to be automatically added to cases.
3. When case status changes to one of the selected statuses: Checkbox-select dropdown, which requires you to choose one or more statuses. If a case covered by the rule changes to one of the selected statuses, the rule will insert the WorkPlan.
4. [...] selected types [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected types [Selection] field are included in the rule. If this field is not selected, the [...] selected types [Selection] field will be ignored when saving the rule.
5. [...] selected types [Selection]: Checkbox-select dropdown, which permits you to choose one or more case types. If a case does not belong to one of the selected case types, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on case type.
6. [...] selected types [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected types [Selection] field are included in the rule. If this field is not selected, the [...] selected types [Selection] field will be ignored when saving the rule.
7. [...] selected types [Selection]: Checkbox-select dropdown, which permits you to choose one or more case sub-types. If a case does not belong to one of the selected case sub-types, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on case sub-type.
8. [...] selected states [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected states [Selection] field are included in the rule. If this field is not selected, the [...] selected states [Selection] field will be ignored when saving the rule.
9. [...] selected states [Selection]: Checkbox-select dropdown, which permits you to choose one or more states. If a case is not in one of the selected states, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on state.
10. [...] selected offices [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected offices [Selection] field are included in the rule. If this field is not selected, the [...] selected offices [Selection] field will be ignored when saving the rule.
11. [...] selected types [Selection]: Checkbox-select dropdown, which permits you to choose one or more of the firm's offices; if a case is not being handled by one of the selected offices, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on office.

WorkPlans in Cases

The WorkPlans in Cases page contains a complete listing of all the WorkPlans that have been included in cases.

The Structure of This Page

| Case# | Case Name | Full Description | Notes | Completion | Start Date | Actions |
|---------|---|--|----------|------------|------------|---------|
| 5015347 | Shivwaller | WorkPlan Name: Training 10-09-2015 | Training | | 10/9/2015 | [X] |
| 6000005 | Selina | WorkPlan Name: zTest Workflow Plan Description: AUTO INSERTED BY ASSIGNMENT RULE | | | 1/28/2016 | [X] |
| 6000005 | Selina | WorkPlan Name: New Case Opening Plan - Auto Accident Description: AUTO INSERTED BY ASSIGNMENT RULE | | | 1/29/2016 | [X] |
| 6000007 | plaintiff, , sample v. John, Doe | WorkPlan Name: KCCLLC - Case Setup | | | 2/2/2016 | [X] |
| 6000009 | McGriff - Janssen Pharmaceuticals, Inc. | WorkPlan Name: KCCLLC - Intake Complete | | | 2/10/2016 | [X] |
| 6000008 | | WorkPlan Name: Lawsu/CURigation Plan - Auto Accident | | | 2/26/2016 | [X] |

1. Add WorkPlan Into Case button: Used to directly add a premade WorkPlan to a case file. See [Adding a WorkPlan to a Case](#).
2. Current WorkPlans In Cases table: Contains the details of WorkPlans that have been included in cases and allows you to remove them from a case. See [Current WorkPlans In Cases Table](#).

The Current WorkPlans In Cases table lists every WorkPlan in a case in the SmartAdvocate system. Each row of the table represents an individual WorkPlan. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Current WorkPlans In Cases table contains the following columns:

| Case# | Case Name | Full Description | Notes | Completion | Start Date | Actions |
|--------|---|--|----------|------------|------------|----------|
| 905347 | SHizwaller | WorkPlan Name: Training 10-09-2015 | Training | | 10/9/2015 | [Delete] |
| 900005 | Spina | WorkPlan Name: zTest Workflow Plan Description: AUTO INSERTED BY ASSIGNMENT RULE | | | 1/28/2016 | [Delete] |
| 900005 | Spina | WorkPlan Name: New Case Opening Plan - Auto Accident Description: AUTO INSERTED BY ASSIGNMENT RULE | | | 1/29/2016 | [Delete] |
| 900007 | glainoff - sample v. John, Doe | WorkPlan Name: KCCLLC - Case Setup | | | 2/2/2016 | [Delete] |
| 900006 | Hillhoff - Sarnes Pharmaceuticals, Inc. | WorkPlan Name: K77112 - Setback Complete | | | 3/15/2016 | [Delete] |

1. Case#: The case number of the case containing the WorkPlan.
2. Case Name: The name of the case containing the WorkPlan.
3. Full Description: The name and description of the WorkPlan.
4. Notes: The special notes of the WorkPlan.
5. Completion Date: The date on which the WorkPlan was marked as completed.
6. Start Date: The date the WorkPlan was inserted into the case file. This information is automatically added at time of insertion of the WorkPlan.
7. Actions: Delete icon.

Deleting a WorkPlan from a Case

To delete a WorkPlan from a case:

1. Click the [Delete icon](#) in the Action column of the row representing the WorkPlan you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
 2. Click the OK button in the message to confirm the deletion. This will delete the row from the Current WorkPlans In Cases table, and also delete the WorkPlan itself from the case it is in.
- If you decide you do not wish to delete the WorkPlan, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a WorkPlan to a Case

To add a new WorkPlan to a case:

1. Click the Add WorkPlan Into Case button. This will bring up a panel for adding WorkPlans directly to cases, completely blank.
 2. Fill the fields in with your desired information. See [The Add WorkPlan to Case Panel](#) for details about the fields.
 3. Click Update to add the WorkPlan and close the panel.
- If you decide you do not wish to add the WorkPlan, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add WorkPlan to Case Panel

The Add WorkPlan to Case Panel allows you to directly add a WorkPlan to a case. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Please select WorkPlan assignment

WorkPlan : Please select the WorkPlan to assign. Can't be empty.

Please select case, that will get this WorkPlan assigned.

Case : B

Description : C

Update Cancel

1. WorkPlan: Dropdown that requires you to choose the WorkPlan to insert into a case.
2. Case: Dropdown that requires you to choose the case into which to insert the WorkPlan.
3. Description: The description to apply to the newly inserted WorkPlan.

How to create a simple work plan to assign a task to multiple cases

Workplan Assignments

The WorkPlan Assignments page allows you to create automatic assignment rules for WorkPlans. Automatic assignment rules cause WorkPlans to be inserted in cases at a predetermined phase of the case and can be customized further to only be used in a subset of cases, based on the case type, state, and/or firm office connected to the case. Assignment rules are essential tools in the use of WorkPlans, as they ensure that WorkPlans are applied consistently and automatically at the appropriate point in your cases.

The Structure of This Page

| <input type="checkbox"/> | Rule Name | Date Created | Enabled | Actions |
|--------------------------|--------------------------------|--------------|-------------------------------------|---------|
| <input type="checkbox"/> | Auto Lit | 12/19/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Initial Steps | 9/27/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | New Case Open MVA | 6/9/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | New Case Work Plan | 3/1/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | No response from client | 9/16/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Send out Non-Engagement Letter | 12/21/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Status shift | 5/18/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Trial Prep | 12/18/2016 | <input checked="" type="checkbox"/> | |

1. New WorkPlan Assignment button: Used to add a new WorkPlan assignment rule to the SmartAdvocate system. See [Adding a WorkPlan Assignment Rule](#).
2. WorkPlan Assignment Administration table: Contains the assignment rule details and allows various actions to be performed on them. See [WorkPlan an Assignment Administration Table](#).

WorkPlan Assignment Administration Table

The WorkPlan Assignment Administration table is where the details of WorkPlan assignment rules are stored. Each row of the table represents an individual rule. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The WorkPlan Assignment Administration table contains the following columns:

| <input type="checkbox"/> | Rule Name | Date Created | Enabled | Actions |
|--------------------------|--------------------------------|--------------|-------------------------------------|---------|
| <input type="checkbox"/> | Auto Lit | 12/19/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Initial Steps | 9/27/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | New Case Open MVA | 6/9/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | New Case Work Plan | 3/1/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | No response from client | 9/16/2016 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Send out Non-Engagement Letter | 12/21/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Status shift | 5/18/2017 | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | Trial Prep | 12/18/2016 | <input checked="" type="checkbox"/> | |

1. [column with checkbox heading]. Checkbox selector.
2. Rule Name. The name of the assignment rule.
3. Date Created. The date the rule was initially created. This field is automatically set at creation of the rule and cannot be edited.
4. Enabled. Checkbox indicating whether the rule is in use or has been (temporarily) deactivated. The box is automatically checked (meaning the rule is enabled) at creation but can be unchecked to deactivate the rule.
5. Action. Edit and Delete icons.

Editing a WorkPlan Assignment Rule

To edit a WorkPlan assignment rule:

1. Right-click anywhere in the row representing the rule you wish to edit. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the rule you wish to edit. This will bring up an Add/Edit panel for WorkPlan assignment rules, with the existing information filled in. Skip to step C.
 2. Click the Edit Rule option in the menu. This will bring up an Add/Edit panel for WorkPlan assignment rules, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Assignment Rule Panel](#) for details about the fields.
 4. Click Update to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a WorkPlan Assignment Rule

To delete a WorkPlan assignment rule:

1. Right-click anywhere in the row representing the rule you wish to delete. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the rule you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step C.
1. Click the Delete Rule option in the menu. This will bring up a confirmation message (to avoid accidental deletions).

2. Click the OK button in the message to confirm the deletion.

- If you decide you do not wish to delete the rule, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a WorkPlan Assignment Rule

To add a new WorkPlan assignment rule:

1. Click the New WorkPlan Assignment button. This will bring up an Add/Edit panel for WorkPlan assignment rules, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Assignment Rule Panel](#) for details about the fields.
3. Click Update to save the rule and close the panel.
 - If you decide you do not wish to save the rule, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Disabling and Enabling a WorkPlan Assignment Rule

You can disable a WorkPlan assignment rule without deleting it. This will prevent it from being applied to any cases, but still allow you to re-enable it later if it becomes important again, without having to recreate it. To disable or enable a WorkPlan assignment rule:

1. Right-click anywhere in the row representing the rule you wish to delete. This will bring up a menu of options.
2. To disable an enabled rule, click the Disable Rule option in the menu. To re-enable a disabled rule, click the Enable Rule option in the menu.

The Add/Edit WorkPlan Assignment Rule Panel

The Add/Edit WorkPlan Assignment Rule Panel allows you to fill in the details of a WorkPlan assignment rule. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows a dialog box titled "WorkPlan assignment rule" with a close button (X) in the top right corner. The dialog contains several input fields and checkboxes, each with a red circular callout number:

- 1**: A text input field with the placeholder text "Please enter the name for this rule".
- 2**: A dropdown menu with the placeholder text "Please select the WorkPlan(s) to assign. Can't be empty.".
- 3**: A dropdown menu with the placeholder text "Please select the status(es). Can't be empty.".
- 4**: A checkbox followed by the text "only if case type is one of the selected types".
- 5**: A dropdown menu with the placeholder text "Please select the case type(es). Will be ignored if empty.".
- 6**: A checkbox followed by the text "only if case sub-type is one of the selected sub-types".
- 7**: A dropdown menu with the placeholder text "Please select the case sub-type(es). Will be ignored if empty.".
- 8**: A checkbox followed by the text "only if case is in one of the selected states".
- 9**: A dropdown menu with the placeholder text "Please select the case state(es). Will be ignored if empty.".
- 10**: A checkbox followed by the text "only if case belongs to one of the selected offices".
- 11**: A dropdown menu with the placeholder text "Please select the case office(es). Will be ignored if empty.".

At the bottom of the dialog, there are two buttons: "Update" and "Cancel".

1. [Name]: The name of the rule.
2. Assign the selected workplan(s) to the case: Checkbox-select dropdown, which requires you to choose the WorkPlans that the rule will cause to be automatically added to cases.
3. When case status changes to one of the selected statuses: Checkbox-select dropdown, which requires you to choose one or more statuses. If a case covered by the rule changes to one of the selected statuses, the rule will insert the WorkPlan.
4. [...] selected types [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected types [Selection] field are included in the rule. If this field is not selected, the [...] selected types [Selection] field will be ignored when saving the rule.
5. [...] selected types [Selection]: Checkbox-select dropdown, which permits you to choose one or more case types. If a case does not belong to one of the selected case types, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on case type.
6. [...] selected types [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected types [Selection] field are included in the rule. If this field is not selected, the [...] selected types [Selection] field will be ignored when saving the rule.
7. [...] selected types [Selection]: Checkbox-select dropdown, which permits you to choose one or more case sub-types. If a case does not belong to one of the selected case sub-types, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on case sub-type.
8. [...] selected states [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected states [Selection] field are included in the rule. If this field is not selected, the [...] selected states [Selection] field will be ignored when saving the rule.
9. [...] selected states [Selection]: Checkbox-select dropdown, which permits you to choose one or more states. If a case is not in one of the selected states, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on state.
10. [...] selected offices [Checkbox]: Checkbox, which permits you to determine whether the contents of the [...] selected offices [Selection] field are included in the rule. If this field is not selected, the [...] selected offices [Selection] field will be ignored when saving the rule.
11. [...] selected types [Selection]: Checkbox-select dropdown, which permits you to choose one or more of the firm's offices; if a case is not being handled by one of the selected offices, it is not covered by the rule. If this field is empty or ignored, cases are not excluded from the rule based on office.

Item Templates

Page under construction. Please check back soon for updates.

Advertisement Campaigns

The Advertisement Campaigns administrative page allows you to keep track of the advertising campaigns run by your firm. The data you store here is essential for the Advertisement Campaigns Dashboard, which is used to help calculate the efficacy of your advertising.

The Structure of This Page

| ADD ADVERTISEMENT CAMPAIGN | Advertisement Campaigns | | | | | | | Export | |
|----------------------------|-------------------------|------------|------------|-----------------------------|----------|--|--|--------|---------|
| Amount Spend | Budget | Start Date | End Date | Campaign | Comments | | | | Actions |
| \$50,000.00 | | 2/1/2023 | 5/5/2023 | Arvo | | | | | |
| \$100,000.00 | | 1/1/2023 | 12/31/2023 | Caribbean News | | | | | |
| \$150,000.00 | | 7/1/2022 | 12/31/2022 | New12 Westchester | | | | | |
| \$10,000.00 | | 1/1/2022 | 12/31/2022 | Florida Turnpike Bill Board | | | | | |
| \$100,000.00 | | 1/1/2022 | 6/30/2022 | Virginia CBS | | | | | |
| \$10,000.00 | | 11/1/2021 | 11/1/2022 | Social Media - Facebook | | | | | |
| \$10,000.00 | \$1,000.00 | 3/24/2021 | 3/31/2021 | HD Advertising | | | | | |
| \$8,250.00 | \$825.00 | 2/23/2021 | 3/23/2021 | HD Advertising | | | | | |
| \$100,000.00 | | 1/1/2021 | 12/31/2021 | New Mexico TV 1 | | | | | |
| \$100,000.00 | | 1/1/2021 | 12/31/2021 | CBS 2 - Boston | | | | | |

This page stores your campaign information in a table, where each row is a separate campaign taking place over a specified time period. There are six columns of information, in addition to one column of actions that can be taken. The information columns are as follows:

- Amount Spend: The cost of the campaign during the time period.
- Budget: The allotted amount of money assigned to the campaign for the time period.
- Start Date: The beginning of the time period.
- End Date: The end of the time period.
- Campaign: The advertiser that is assigned to the campaign (i.e. Cable TV, Yellow Pages, Facebook, etc.). The contacts that can be added to this column are only those with the contact type Advertise.
- Comments: Any comments about the campaign.
- Actions: Contains an [Edit icon](#), which opens the Add/Edit Advertisement Campaign Panel containing the information about the campaign; and a [Delete icon](#), which allows you to delete the row (there will be a confirmation message that appears to prevent accidental deletion).

Adding a New Advertisement Campaign

To add a new row, click the Add Advertisement Campaign button in the upper left corner of the screen, which opens a completely blank Add/Edit Advertisement Campaign Panel.

Add Advertisement Campaign

Amount Spend:* Budget:

Start Date:*

End Date:

Campaign:*

Comments:

SAVE **CANCEL**

To add a new row, click the Add Advertisement Campaign button in the upper left corner, which opens the Add/Edit Advertisement Campaign Panel, completely blank.

The Add/Edit Advertisement Campaign contains a [Text input](#) field for Amount Spend and Budget, a [Date-widget dropdown](#) for each of Start Date and End Date, a [Dropdown](#) labeled Campaign listing each of the contacts in your system with the type Advertise, and a [Text input](#) field for Comments. Amount Spend, Start and End Date, and Campaign are required fields.

Automated Procedure Management

The Automated Procedure Management page allows you to create procedures that will automatically take place within your cases. These actions can take place based on the creation or completion of a number of triggers in the system and allow for more individualized automation than that found in WorkPlans.

The Structure of this Page

| Automated Procedure Management | | | | | | | | | | |
|---|---|--|-------------------------------------|--------------|---------------|--------|--|--|--|--|
| Procedure Name | Trigger Info | Action Info | Enabled | Date Created | Date Modified | Action | | | | |
| <input type="checkbox"/> IM Intake Sign-Up Kit Follow Up | Triggered By 1 Triggers: Case Status | Creates 2 Actions: Send Email,Send Text Message | | 8/11/2020 | 8/11/2020 | | | | | |
| <input type="checkbox"/> IM Lead Follow Up | Triggered By 1 Triggers: Case Status | Creates 3 Actions: Send Email,Send Text Message | | 7/23/2020 | 8/24/2020 | | | | | |
| <input type="checkbox"/> Address Follow Up | Triggered By 1 Triggers: Case Status | Creates 2 Actions: Generate Task,Send Email | | 7/28/2018 | 7/23/2020 | | | | | |
| <input type="checkbox"/> Appointment Reminder Text | Triggered By 1 Triggers: Appointment | Creates 1 Actions: Send Email | <input checked="" type="checkbox"/> | 8/7/2020 | | | | | | |
| <input type="checkbox"/> Int | Triggered By 1 Triggers: Case Status | Creates 1 Actions: Remove Staff | | 4/10/2020 | 7/24/2020 | | | | | |
| <input type="checkbox"/> Birthday Email | Triggered By 1 Triggers: Birthday | Creates 1 Actions: Send Email | | 7/6/2021 | 7/6/2021 | | | | | |
| <input type="checkbox"/> Calendar Clerk Notification | Triggered By 1 Triggers: Document | Creates 1 Actions: Send Email | <input checked="" type="checkbox"/> | 10/1/2020 | | | | | | |
| <input type="checkbox"/> Check for Motion Decision | Triggered By 1 Triggers: Document | Creates 1 Actions: Generate Task | | 9/25/2021 | 9/25/2021 | | | | | |
| <input type="checkbox"/> Client Follow-Up | Triggered By 1 Triggers: Case Status | Creates 1 Actions: Generate Task | | 9/14/2018 | 4/1/2020 | | | | | |
| <input type="checkbox"/> Court Documents Follow-up | | | | 6/12/2018 | 7/24/2020 | | | | | |
| <input type="checkbox"/> CRIS - Assign Book Keeper and Generate Closing Documents | Triggered By 1 Triggers: Case Status | Creates 3 Actions: Add Staff,Generate Document | | 7/6/2019 | 6/9/2020 | | | | | |
| <input type="checkbox"/> CRIS - Assign Task for Medical Records Request Follow Up | Triggered By 1 Triggers: Document | Creates 1 Actions: Generate Task | | 9/7/2021 | 9/30/2021 | | | | | |
| <input type="checkbox"/> CRIS - Change Case Status | Triggered By 1 Triggers: Case Status | Creates 1 Actions: Add Case Status | | 4/9/2021 | 7/15/2021 | | | | | |
| <input type="checkbox"/> CRIS - Generate New Case Opening Bundle | Triggered By 2 Triggers: Case Status,Document | Creates 2 Actions: Generate Document,Send Text Message | | 8/2/2021 | 10/17/2021 | | | | | |
| <input type="checkbox"/> CRIS - Happy Birthdays to client - English | Triggered By 1 Triggers: Birthday | Creates 1 Actions: Send Email | | 12/14/2020 | 12/14/2020 | | | | | |

1. Add New Procedure: This button is used to create a new procedure.
2. Automated Procedure Administration Table: This table contains the details of all the Automated Procedures contained in the system and allows various actions to be performed on them.

Automated Procedure Administration Table

The Automated Procedure Administration Table is where the descriptive details of your Automated Procedures are stored. Each row of the table represents an individual Procedure. See [Tables](#) for more general information about table structures and usage, including all buttons and other tools in the table that are not mentioned below.

Columns in This Table

The Automated Procedure Management Table contains the following columns:

ADD NEW PROCEDURE

Automated Procedure Management

| <input type="checkbox"/> | Procedure Name | Trigger Info | Action Info | Enabled | Date Created | Date Modified | Action |
|--------------------------|---------------------------------|--------------------------------------|--|-------------------------------------|--------------|---------------|----------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| <input type="checkbox"/> | 3M Intake Sign Up Kit Follow Up | Triggered By 1 Triggers: Case Status | Creates 2 Actions: Send Email, Send Text Message | <input type="checkbox"/> | 8/11/2020 | 8/11/2020 | |
| <input type="checkbox"/> | 3M Lead Follow Up | Triggered By 1 Triggers: Case Status | Creates 3 Actions: Send Email, Send Text Message | <input type="checkbox"/> | 7/23/2020 | 8/26/2020 | |
| <input type="checkbox"/> | Adderral Follow Up | Triggered By 1 Triggers: Case Status | Creates 2 Actions: Generate Task, Send Email | <input type="checkbox"/> | 7/28/2018 | 7/23/2020 | |
| <input type="checkbox"/> | Appointment Reminder Test | Triggered By 1 Triggers: Appointment | Creates 1 Action: Send Email | <input checked="" type="checkbox"/> | 8/7/2020 | | |

1. [Column with Checkbox Heading]: Checkbox selector.
2. Procedure Name: The name of the procedure.
3. Trigger Info: Provides a brief description of trigger information, including the number of triggers assigned to the procedure and the type of triggers (i.e. document, status, etc.)
4. Action Info: Provides a brief description of the action information, including the number of actions and the type of actions to be performed.
5. Enabled: Whether or not the procedure is enabled. An enabled procedure is indicated by a checkmark.
6. Date Created: The date the procedure was created.
7. Date Modified: The most recent date the procedure was modified.
8. Action: Includes an [Action icon](#) that allows you to edit, enable (if not current enabled) or disable (if currently enabled), copy, or delete a procedure.

Editing an Automated Procedure

To edit an existing Procedure:

1. Right-click anywhere in the row representing the procedure you wish to edit. This will display a menu allowing you to edit the procedure, enable or disable the procedure, delete or copy the procedure.
 - a. Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the procedure you wish to edit. This will bring up an Add/Edit panel for the procedure with the existing information filled in.
 - b. The options in this menu allow you to edit, copy or delete the rule, and it will also give you the option to enable or disable the rule depending on its current status. Disabling a procedure will stop it from taking place without deleting it from the system. This allows you to go back and enable the procedure at a later date if you choose.
2. Select the Edit Procedure option in the menu. This will bring up an Add/Edit panel for the procedure, with the existing information filled in.
3. Fill the fields in with your desired information. See the [Add/Edit Automated Procedure Details Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - a. If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Automated Procedure

To delete an Automated Procedure:

1. Right-click anywhere in the row representing the procedure you wish to delete. This will bring up a menu of options.
 - a. Alternatively, you can click Disable in the menu to stop the procedure from running without removing it from the system entirely.
2. Click the Delete Procedure option in the menu. This will bring up a confirmation message (to avoid accidental deletions). Click the OK button in the message to confirm the deletion.
 - a. If you decide you do not wish to delete the rule, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - b. Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a New Procedure

To add a new Procedure:

1. Click the Add New Procedure button. This will bring up an Add/Edit panel for automated procedures that is blank.
2. Fill the fields in with your desired information. See the [Add/Edit Automated Procedure Details Panel](#) for details about each field.
3. Click Save to save the procedure and close the panel.
 - a. If you decide you do not wish to save the procedure click Cancel instead of clicking Update to undo the changes and close the panel. Alternatively, you can click the white X in the top right of the panel to do the same thing.

The Add/Edit Automated Procedure Details Panel

The Add/Edit Automated Procedure Details Panel allows you to fill in the detail of an Automated Procedure. The panel contains the following fields:

Automated Procedure Details

Procedure name:

Enabled

ADD NEW SCOPE

Procedure Scope

 Enable only for open cases

| Scope Description | Combined Details | Actions |
|--|------------------|---------|
| No scopes selected. Procedure will work for all cases. | | |

1. Procedure Name: The name of the procedure.
2. Enabled: A checkbox that when checked, enables the procedure.
3. Add New Scope: Allows you to add a new scope to the procedure. For more on this see [Setting the Scope of an Automated Procedure](#).
4. Enable only for open cases: A checkbox that when checked, enables the procedure only for open cases.
5. Procedure Scope Table: A table that summarizes the details of the Procedure's scopes.
6. Add New Trigger: Allows you to add new triggers to the procedure. For more on this see [Setting an Automated Procedure's Trigger](#).
7. Procedure Trigger(s) Table: A table that summarizes the details of the Procedure's triggers.
8. Add New Action: Allows you to add a new action to the procedure. For more on this see [Setting the Action to be Taken by an Automated Procedure](#).
9. Procedure Action(s) Table: A table that summarizes the details of the actions to be performed by the Procedure.

Setting the Scope of an Automated Procedure

When creating a new automated procedure in SmartAdvocate you are able to apply different criteria to limit the scope of when it will be applied. Note that it is not required that you assign a scope to an automated procedure for it to run. To assign a new scope:

1. Click the Add New Scope button in the [Add/Edit Automated Procedure Details Panel](#) to open the Scope Edit Panel.
2. Inside the Scope Edit Panel, there will be a dropdown that allows you to select what category you would like to use to limit the scope of the procedure. Once you have selected the broad category from the first dropdown, additional dropdowns will appear prompting you to select a specific item(s) from within that category.
3. Once you have finished setting the scope(s), simply press save to add it to the procedure.
 - a. If you decide you do not wish to add this scope, you can press cancel to discard any changes made in this panel. Additionally, you can press the white X in the top right corner of the panel to do the same.

This process may be repeated multiple times for each additional scope you would like to add to the procedure.

Setting an Automated Procedure's Trigger

The trigger assigned to an Automated Procedure is what signals to the system that the procedure's action should occur. Once the trigger occurs, the system will automatically perform the action(s) assigned to the procedure. To assign a new trigger:

1. Click the Add New Trigger button in the [Add/Edit Automated Procedure Details Panel](#) to open the Trigger Edit Panel.
2. Inside the Trigger Edit Panel, there will be a dropdown that allows you to choose from a number of different triggers. Once you have selected the broad trigger type, more dropdowns will appear to prompt you to enter specific details related to the trigger.
3. Once you have finished setting the trigger(s), simply press save to add it to the procedure.
 - a. If you decide you do not wish to add this trigger, you can press cancel to discard any changes made in this panel. Additionally, you can press the white X in the top right corner of the panel to do the same.

This process may be repeated as many times as you would like to add additional triggers to the procedure.

Setting the Action to be Taken by an Automated Procedure

The action assigned to an Automated Procedure is what will ultimately be performed once the trigger has been performed. To assign a new action:

1. Click the Add New Action button in the [Add/Edit Automated Procedure Details Panel](#) to open the Action Details Panel.
2. Inside the Action Details Panel, you will be prompted to enter information related to the Action Type, Action Start Dates, and specific details related to the specific Action Type. For more details on the fields inside this panel see [Action Details Panel](#).
3. Once you have finished adding the action(s) settings, simply press save to add it to the procedure.
 - a. If you decide you do not wish to add this action, you can press cancel to discard any changes made in this panel. Additionally, you can press the white X in the top right corner of the panel to do the same.

This process may be repeated as many times as you would like to add additional actions to the procedure.

Action Details Panel

The Action Details Panel allows you to assign the action or actions that will be performed by the automated procedure. The fields inside this panel include:

The screenshot shows the 'Action Details' panel with the following fields and callouts:

- 1: Action Type dropdown menu.
- 2: Action Name text input field.
- 3: Action Start Days input field.
- 4: Action Start Hours input field.
- 5: Action Start Minutes input field.
- 6: Action Start Direction dropdown menu (set to 'After').
- 7: Action Start Trigger item creation date dropdown menu.
- 8: Action Repeat Days input field.
- 9: Action Repeat Hours input field.
- 10: Action Repeat Minutes input field.
- 11: Action Repeat Day type dropdown menu (set to 'All, including weekends.').

Buttons for 'SAVE' and 'CANCEL' are located at the bottom right of the panel.

1. Action Type: A dropdown requiring you to select the action type to be assigned by the procedure.
2. Action Name: The name of the action, this is automatically filled by the type of action selected in item 1 but can be edited after.
3. Action Start (Days): The number of days after or before a specific date (as selected in items 6 and 7) when the action should be performed.
4. Action Start (Hours): The number of hours after or before a specific date (as selected in items 6 and 7) when the action should be performed.
5. Action Start (Minutes): The number of minutes after or before a specific date (as selected in items 6 and 7) when the action should be performed.
6. Action Start (Direction): Dropdown requiring a selection of whether to set the action to be performed before or after the triggering date. The default for this field is set to After.
7. Action Start (Date): Dropdown requiring a selection of when the action should be performed relative to the trigger, the options are **Trigger item creation date**, **Trigger item due date**, and **Trigger item completion date**. The default for this field is set to Trigger item creation date.
8. Action Repeat (Days): How many days after the action is initially performed by the procedure should the action repeat.
9. Action Repeat (Hours): How many hours after the action is initially performed by the procedure should the action repeat.
10. Action Repeat (Minutes): How many minutes after the action is initially performed by the procedure should the action repeat.
11. Day Type: Dropdown to choose how the days entered in the Action Start or Action Repeat fields should be calculated (using all days, weekdays, federal or state).

Action Type Options

If **Add Case Expense (Disbursement)** is selected in Action Type, the following fields will appear:

The screenshot shows the 'Action Details' panel for the 'Add Case Expense (Disbursement)' action type. The fields and callouts are:

- 1: Amount input field (set to '\$0.00').
- 2: Disbursement Type dropdown menu.
- 3: Check Status dropdown menu.
- 4: Comments text area.

The standard Action Start and Action Repeat fields are also present but not numbered in this specific view.

SAVE
CANCEL

1. Amount: A text field allowing you to enter the amount of the expense to be added.
2. Disbursement Type: A dropdown prompting you to choose from the defined Disbursement types in the system to be assigned to the expense being added.
3. Check Status: A dropdown prompting you to choose from the defined Check Statuses in the system to be assigned to the expense being added.
4. Comments: A text field allowing you to enter any comments that will assign to the expense being added.

If **Add Case Status** is selected in Action Type, the following fields will appear:

Action Details ✕

Action Type: Add Case Status

Action Name: Add Case Status:

Action Start: Days: Hours: Minutes:
After Trigger item creation date

Action Repeat: Days: Hours: Minutes:
Day type: All, including weekends.

Case Status: 1 Please select the status or leave empty.

Status Comments: 2

Please enter the status comments

SAVE
CANCEL

1. Case Status: A dropdown requiring you to choose the status that will be assigned by the procedure.
2. Status Comments: A text box allowing you to add any necessary status comments.

If **Add Case Tag** is selected in Action Type, the following fields will appear:

Action Details ✕

Action Type: Add Case Tag

Action Name: Add Case Tag:

Action Start: Days: Hours: Minutes:
After Trigger item creation date

Action Repeat: Days: Hours: Minutes:
Day type: All, including weekends.

Case Tag: 1 Please select a case tag

SAVE
CANCEL

1. Case Tag: A dropdown containing all case tags, requiring you to select the case tag to be added.

If **Add Staff** is selected in Action Type, the following fields will appear:

Action Details ✕

Action Type: Add Staff

Action Name: Add Staff:

Action Start: Days: Hours: Minutes:

After Trigger item creation date

Action Repeat: Days: Hours: Minutes:

Day type: All, including weekends.

Staff Name: **1**

Staff Role: **2**

SAVE **CANCEL**

1. Staff Name: A dropdown containing all of the firm staff members, requiring you to choose the staff member that will be assigned by the procedure.
2. Staff Role: A dropdown containing firm roles, requiring you to choose the role that the staff member selected in A will be assigned.

If **Generate Deadline** is selected in Action Type, the following fields will appear:

Action Details

Action Type:

Action Name:

Action Start: Days: Hours: Minutes:

After Trigger item creation date

Action Repeat: Days: Hours: Minutes:

Day type: All, including weekends.

1 General Discovery

Deadline type: **2**

Responsible Party: **3**

Due days since creation: **4**

Deadline comments: **5**

SAVE **CANCEL**

1. [Deadline Category]: A radio button requiring you to choose whether the deadline will be listed as a General or Discovery deadline. General is selected by default.
2. Deadline Type: A dropdown requiring you to select the type of deadline that will be assigned by the procedure.
3. Responsible Party: A dropdown requiring you to select who is responsible for meeting the deadline. The only options in this dropdown are **Primary Plaintiff** or **Primary Defendant**.
4. Due days since creation: The number of days until the deadline is due after it is inserted by the procedure. The days in this field are counted using all days, including weekends and holidays.
5. Deadline Comments: A textbox allowing you to add any necessary comments to the deadline.

If **Generate Document** is selected in Action Type, the following fields will appear:

Action Details

Action Type:

Action Name:

Action Start: Days: Hours: Minutes:

After Trigger item creation date

Action Repeat: Days: Hours: Minutes:

Day type: All, including weekends.

Document Template: **1**

Document Comments: **2**

Select printer to auto-print document when generated. **3**

NO PRINTER [Do not print]

SAVE CANCEL

1. Document Template: A dropdown requiring you to select the document template to be generated by the procedure.
2. Document Comments: A textbox allowing you to add any comments that should be included in the properties of the document when it is generated.
3. Select printer to auto print...: A dropdown allowing you to choose which printer you would like the document to be printed from. The default is set to NO PRINTER [do not print].

If **Generate Note** is selected in Action Type, the following fields will appear:

Action Details

Action Type: Generate Note

Action Name: Generate Note:

Action Start: Days: Hours: Minutes: After Trigger item creation date

Action Repeat: Days: Hours: Minutes: Day type: All, including weekends.

Note Template: **1** Please select note template or leave empty

Priority: **2** Please select note priority

Note Type: **3** Please select note type

Note: **4**

SAVE CANCEL

1. Note Template: A dropdown allowing you to select a note template to be generated by the procedure. If a note template is selected, you can bypass adding the rest of the note properties. This field is not required.
2. Priority: A dropdown allowing you to choose the note's priority level.
3. Note Type: A dropdown allowing you to choose the note type.
4. Note: A textbox where the body of the note can be entered.

If **Generate Task** is selected in Action Type, the following fields will appear:

Action Details

Action Type: Generate Task

Action Name: Generate Task:

Action Start: Days: Hours: Minutes: After Trigger item creation date

Action Repeat: Days: Hours: Minutes: Day type: All, including weekends.

Task template: **1** Please select task template or leave empty for custom task options

Task type: **2** Please select task type

Task priority: **3** Please select task priority

SELECT ASSIGNEE: **4** Please select the task assignee

The screenshot shows a task creation form with the following fields and annotations:

- 5**: Points to the "SELECT REQUESTOR:" dropdown menu.
- 6**: Points to the "Due days since creation:" input field.
- 7**: Points to the "Task subject:" input field.
- 8**: Points to the "Task description:" input field.

Buttons for "SAVE" and "CANCEL" are visible at the bottom right.

1. Task Template: A dropdown allowing you to assign a task template to be added by the procedure. If a template is assigned from this dropdown, the only other required fields in this form will be Task Assignee, Task Requestor, and Due Days..., you may bypass the others. This field is not required.
2. Task Type: A dropdown allowing you to choose the task type.
3. Task Priority: A dropdown allowing you to assign the task priority.
4. Select Assignee: The individual the task will be assigned to. Clicking the Select Assignee button will bring up a panel allowing you to automatically set a case role or specific individual staff member as the assignee.
5. Select Requestor: The individual who will be assigned as the requestor of the task. Clicking the Select Requestor button will bring up a panel allowing you to automatically set a case role or specific individual staff member as the requestor.
6. Due Days Since Creation: The number of days after the task's creation that it will be marked as due. This is counted using all days, including weekends and holidays.
7. Task Subject: The subject of the task.
8. Task Description: The description of the task.

If **Insert WorkPlan** is selected in Action Type, the following fields will appear:

The screenshot shows the "Action Details" form for "Insert Workplan" with the following fields and annotations:

- 1**: Points to the "Workplan:" dropdown menu.

Other fields include Action Type (Insert Workplan), Action Name (Add Workplan), Action Start (Days, Hours, Minutes), Trigger item creation date (After), Action Repeat (Days, Hours, Minutes), and Day type (All, including weekends). Buttons for "SAVE" and "CANCEL" are visible at the bottom right.

1. WorkPlan: A dropdown requiring you to select a WorkPlan to be assigned by the procedure.

If **Remove Case Status** is selected in Action Type, the following fields will appear:

The screenshot shows the "Action Details" form for "Remove Case Status" with the following fields and annotations:

- 1**: Points to the "Status Type:" dropdown menu.
- 2**: Points to the "Case Status:" dropdown menu.
- 3**: Points to the "Status Comments:" input field.

Other fields include Action Type (Remove Case Status), Action Name (Remove Case Status), Action Start (Days, Hours, Minutes), Trigger item creation date (After), Action Repeat (Days, Hours, Minutes), and Day type (All, including weekends). Buttons for "SAVE" and "CANCEL" are visible at the bottom right.

SAVE

CANCEL

1. Case Status: A dropdown requiring you to choose the status to be removed by the procedure.
2. Status Comments: A text box allowing you to add any necessary status comments.

If **Remove Case Tag** is selected in Action Type, the following fields will appear:

Action Details

Action Type: Remove Case Tag

Action Name: Remove Case Tag:

Action Start: Days: [] Hours: [] Minutes: []
After [] Trigger item creation date []

Action Repeat: Days: [] Hours: [] Minutes: []
Day type: All, including weekends.

Case Tag: **1** Please select a case tag

SAVE CANCEL

1. Case Tag: A dropdown containing all case tags, requiring you to select the case tag to be removed.

If **Remove Staff** is selected in Action Type, the following fields will appear:

Action Details

Action Type: Remove Staff

Action Name: Remove Staff:

Action Start: Days: [] Hours: [] Minutes: []
After [] Trigger item creation date []

Action Repeat: Days: [] Hours: [] Minutes: []
Day type: All, including weekends.

Staff Name: **1** Please select staff member

Staff Role: **2** Please select the case role

SAVE CANCEL

1. Staff Name: A dropdown allowing you to select the name of the firm staff member to be removed.
2. Staff Role: A dropdown allowing you to select the case role to be removed.

If **Send Email** is selected in Action Type, the following fields will appear:

Action Details

Action Type: Send Email

Action Name: Send Email:

Action Start: Days: [] Hours: [] Minutes: []
After [] Trigger item creation date []

Action Repeat: Days: [] Hours: [] Minutes: []
Day type: All, including weekends.

FROM: Please enter the sender email **1**

TO: Please add email respondent(s) **2**

CC: Please add email respondent(s) **3**

BCC: Please add email respondent(s) **4**

5
6
7
8
9
10
11

SAVE CANCEL

1. From: The sender of the email in the From field. Clicking the From button next to this field will bring up a panel allowing you to automatically set yourself, any staff member, any role in the case, or the user at the time the email is generated as the sender of the email.
2. To: The recipient(s) of the email in the To field. Clicking the To button next to this field will bring up a panel allowing you to automatically add yourself, any staff member, any role in the case, any contact in the SmartAdvocate system, the user at the time the email is generated, the primary plaintiff, the primary plaintiff contact, the primary defendant, all plaintiffs, all defendants, or all case staff to the list of recipients of the email.
3. CC: The recipients of a CC of the email. Clicking the CC button next to this field will bring up a panel allowing you to automatically add yourself, any staff member, any role in the case, any contact in the SmartAdvocate system, the user at the time the email is generated, the primary plaintiff, the primary plaintiff contact, the primary defendant, all plaintiffs, all defendants, or all case staff to the list of recipients of the email.
4. BCC: The recipients of a BCC of the email. Click the BCC button next to this field will bring up a panel allowing you to automatically add yourself, any staff member, any role in the case, any contact in the SmartAdvocate system, the user at the time the email is generated, the primary plaintiff, the primary plaintiff contact, the primary defendant, all plaintiffs, all defendants, or all case staff to the list of recipients of the email.
5. Email Priority: A dropdown requiring you to select the priority of the email. The default is set to High.
6. Email Template: Dropdown permitting you to choose which email template will be generated and sent when the action is triggered.
7. Email Subject: The "Subject" of the email.
8. Email Body: The body of the email. If there is a template selected this area should be left blank.
9. Attach Template: A dropdown allowing you to choose a document template to be sent with the email.
10. Document(s): Allows you to choose documents of a particular category/sub-category to be attached to the email.
11. Quantity: The number of documents from the sub-category selected in item 10 to be attached to the email.

If **Send for E-Signature** is selected in Action Type, the following fields will appear:

Action Details

Action Type: Send for E-Signature

Action Name: E-Sign Document(s):

Action Start: Days: Hours: Minutes: After Trigger item creation date

Action Repeat: Days: Hours: Minutes: Day type: All, including weekends.

SIGNERS 1

Document Templates for E-Sign: 2

E-Sign provider to use: Nothing Selected 3

Preferred way of contact: Prefer Emails 4

Document Comments: 5

SAVE CANCEL

1. Signers: The recipient responsible for signing the document. Clicking the Signers button will bring up a panel allowing you to choose which role will be responsible for signing (e.g. primary plaintiff, primary contact, etc.). No more than 2 signers can be added.
2. Document Templates for E-Sign: A dropdown requiring you to select at least one document template to be sent for e-signature.
3. E-Sign Provider to Use: A dropdown requiring you to choose which e-sign provider the document(s) will be utilized for the e-signature.
4. Preferred Way of Contact: A dropdown requiring you to choose whether the document should be sent for signature via email, text, or both. The default is set to Prefer Emails.

- Document Comments: A textbox allowing you to add any comments that should be included in the properties of the document when it is generated.

If **Send Text Message** is selected in Action Type, the following fields will appear:

The screenshot shows the 'Action Details' form for 'Send Text Message'. The form includes the following fields and controls:

- Action Type:** Send Text Message (dropdown)
- Action Name:** Send Text Message (text input)
- Action Start:** Days, Hours, Minutes (input fields); After (dropdown); Trigger item creation date (dropdown)
- Action Repeat:** Days, Hours, Minutes (input fields); Day type: All, including weekends (dropdown)
- SEND TO:** A button that triggers a recipient selection panel.
- Text Template:** Please select text template or leave empty for custom message (dropdown)
- Text Message:** Add a custom text message if template is not selected. (text area)
- SAVE** and **CANCEL** buttons at the bottom right.

Red numbers 1, 2, and 3 are overlaid on the form to indicate key areas: 1 points to the 'SEND TO' button, 2 points to the 'Text Template' dropdown, and 3 points to the 'Text Message' text area.

- Send To: The recipient of the text message. Clicking the Send To button will bring up a panel allowing you to choose the recipient of the text from a list of case roles.
- Text Template: A dropdown allowing you to select a text template upon which the text will be based.
- Text Message: The body of the text. If a text template has been selected this field can be left blank.

Case Menu Configurator

The Case Menu Configurator administrative page allows you to revise the case pages available in a particular case group, including which pages are available, the headings under which the pages appear, the order in which the pages appear, and the names shown for each page.

The Structure of This Page

The screenshot shows the Case Menu Configurator administrative page with three main sections:

- Select a case group:** A list of case groups including Basic, Civil Rights, Class Actions, Construction Accidents, Core, Criminal Defense, CRS - Auto Accidents, CRS - Defective Pharmaceuticals, CRS - Employees, CRS - Funding Company, CRS - Product Liability, Defective Medical Devices, Defective Pharmaceuticals, Employment, Family Law, Fire Litigation, General Negligence, General Practice, Government Benefits, Hurricane Damage, Immigration, Insurance Defense, and Maritime. A red '1' is placed next to 'Basic'.
- Choose Pages:** A list of available case pages including Adverse Exams, All Contacts, All Insurance, All Vehicles, Appeals, ARB/Mediations, Attorneys, Attorneys (Defendant), Bankruptcy, Calendar, Caption, Case UDF, Case Value, Client Portal, Complaints, Complaints/Answers, Court, Court Rules, Court UDFs, Critical Comments, Critical Deadlines, Custom View Page 1, Custom View Page 2, Custom View Page 3, Custom View Page 4, Custom View Page 5, Death Compromise, Death Compromise Distribution, and Plaintiff Information. A red '2' is placed next to 'Adverse Exams'. There are 'ADD >>' and '<< REMOVE' buttons between the lists.
- Selected Pages:** A table showing the selected pages and their names. A red '3' is placed next to the 'Selected Pages' header. The table has two columns: 'Selected Pages' and 'Page Names'.

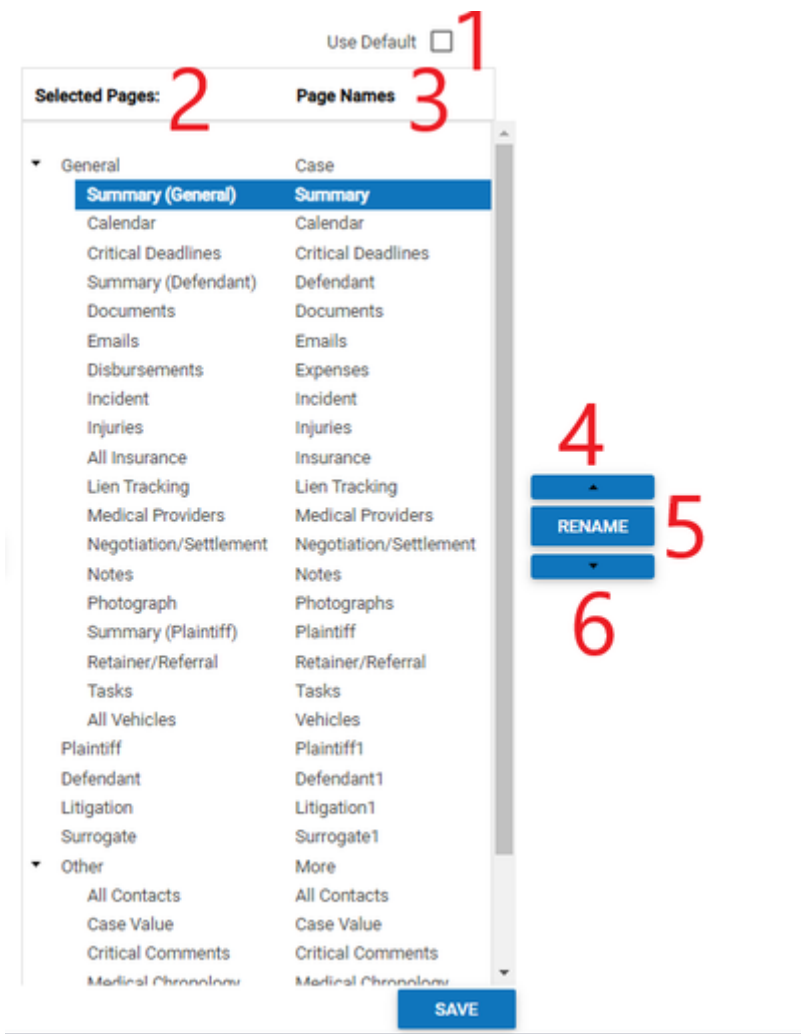
| Selected Pages | Page Names |
|------------------------|------------------------|
| General | Case |
| Summary (General) | Summary |
| Calendar | Calendar |
| Critical Deadlines | Critical Deadlines |
| Summary (Defendant) | Defendant |
| Documents | Documents |
| Emails | Emails |
| Disbursements | Expenses |
| Incident | Incident |
| Injuries | Injuries |
| All Insurance | Insurance |
| Lien Tracking | Lien Tracking |
| Medical Providers | Medical Providers |
| Negotiation/Settlement | Negotiation/Settlement |
| Notes | Notes |
| Photograph | Photographs |
| Summary (Plaintiff) | Plaintiff |
| Retainer/Referral | Retainer/Referral |
| Tasks | Tasks |
| All Vehicles | Vehicles |
| Plaintiff | Plaintiff1 |
| Defendant | Defendant1 |
| Litigation | Litigation1 |
| Surrogate | Surrogate1 |
| Other | More |
| All Contacts | All Contacts |
| Case Value | Case Value |
| Critical Comments | Critical Comments |
| Medical Professionals | Medical Professionals |

 There are 'RENAME' and 'SAVE' buttons at the bottom right of this section.

The Case Menu Configurator administrative page consists of three tables:

- A list of the Case Groups in the SmartAdvocate system.
- A list of the available case pages.
- A list of the pages that will be available for the case group chosen, along with the heading under which each page will be listed and the name that will be shown for the page.

1. The left-most table, labeled “Select a case group” lists all Case Groups available in the SmartAdvocate system (See Case Groups for details). The first item in the list is System Default. When choosing the case pages to be available for a particular case group, you can either individually select the available pages, or choose to use a default set of pages, the details of which are set under the System Default item.
2. The center table lists all of the pages that are available to add to appear for a particular case group (including the System Default item). At the top of the table is a filter, which allows you to limit the pages that are visible by the heading under which that page generally falls (General, Plaintiff, Defendant, Litigation, Surrogate, and Other). In order to add a page to the case group, click the name of the page to highlight it and click the Add button.
3. The right most table contains the pages assigned to that case group and consists of two columns, and includes the following elements:



1. Use Default [Checkbox]: Allows you to choose whether to use the default case pages for the case group rather than choosing them individually. If checked, the center table for choosing pages, and the right table displaying the assigned pages will be grayed out and cannot be edited.
2. Selected Pages: A list of the pages that have been assigned to display in the selected case group.
3. Page Names: A list of the names that will be displayed in the case page. The names can be edited by selecting a page from the list and clicking the Rename button.
4. Up Button: Allows you to move a page to another location in the list. Click on the page you want to move, and then click on the up button to move the page up in the list.
 - a. Alternatively, you can click and drag the name of the page within the table to change the order it appears in.
5. Rename Button: Allows you to edit the name by which a page will be displayed in the case page.
6. Down Button: Allowed you to move a page to another location in the list. Click on the page you want to move, and then click on the down button to move the page down in the list.

Client Portal Administration

The SmartAdvocate Client Portal is a website that permits your firm to collaborate with your clients without requiring direct interaction with your staff. You can make documents, notes, and other information from SmartAdvocate available to clients, while clients can also upload information directly into their SmartAdvocate case file. No information from SmartAdvocate is *automatically* made available on the Client Portal; specific action is required by your or a staff member (for example, clicking on a checkbox marked "Share in Client Portal") in order for anything to be shared. (The only exceptions are *appointments in which the client is a participant*; these will automatically be visible to the client on the Portal.) Access to the Client Portal, what information is available, and how it appears, are governed by the Client Portal Administration page.

As of the writing of this Manual, the Client Portal is in beta and thus not generally accessible. It should be available to all customers in the next SmartAdvocate release. As a result, there may be modifications to the information in this Manual when the Client Portal is officially released. If you have any questions about the Client Portal, please contact our support team at support@smartadvocate.com.

The Structure of This Page

The information in Client Portal Administration is divided into five tabs. All five tabs are visible at all times, however the contents of only one tab is visible at a time; click the heading of the tab you want to access to bring up that tab's information. The available tabs are Registration Token Management, Password Reset Token Management, User Management, Case Statuses, and Look & Feel. There is also a date range field (with an Apply button), which filters the results in the active tab based on the date an action was taken.

Client Portal Administration

From: 6/6/2018 To: 7/6/2018 Apply

Registration Token Management Password Reset Token Management User Management Case Statuses Look & Feel

Generate new token

Drag a column header here to group by that column

| Registration Email | Registration Token | Token Issued |
|--------------------|--------------------|--------------|
| | | |

Registration Token Management

Invitations to clients for accessing the Client Portal, including the generation of tokens, are accomplished in this tab.

Client Portal Administration

From: 6/6/2018 To: 7/6/2018 Apply

Registration Token Management Password Reset Token Management User Management Case Statuses Look & Feel

Generate new token

Drag a column header here to group by that column

| Registration Email | Registration Token | Token Issued | Token Used | Name | User Name | # |
|--------------------|--------------------|--------------|------------|-----------------|-----------|---|
| | | 4/1/2018 | 4/1/2018 | | | |
| | | 4/30/2018 | 4/30/2018 | Sheral, Ahmad | | |
| | | 5/1/2018 | 5/1/2018 | Ward, James | | |
| | | 5/1/2018 | 5/1/2018 | Ingelberg, Carl | | |

1. Generate New Token button: Used to generate a token, which allows a client access to the Client Portal. Select the client to whom you would like to send an invitation. The contact must have their SSN number listed on their contact card, as the last 4 digits are required to complete their registration.

Please select contact to generate invitation token.

Please select a contact

Dreier, Harry <harry@smartadvocate.com>

Generate invitation email

Cancel OK

1. Registration Email: The client's email address, taken from their contact card. The registration invitation will be sent to this address.
2. Registration Token: The registration token automatically created for this. The token is automatically created by SmartAdvocate and cannot be edited.
3. Token Issued: The date this client's registration token was issued.
4. Token Used: The date this client's registration token was used to register for the client portal.
5. Name: The client's name.
6. User Name: The client's user name for access to the Client Portal (usually the client's email address).
7. #: The Action column. Until a client activates his or her token by clicking the link in the invitation email they receive, a Delete button will be available to delete the token and remove that client's access to the Client Portal. Once the token has been activated, the token can no longer be deleted and this column is empty.

Password Reset Token Management

In the event a client has forgotten his or her password for the Client Portal, a new token must be issued to that client. The process is identical to creating an original Registration Token, except the email sent to the client is for a password reset, rather than an invitation.

Please select user to generate password reset token to.

Please select a user

Send password reset email

Cancel OK

User Management

A client's current status on the Client Portal can be viewed and edited in this tab.

| Name | User Name | Contact Card | Last Login | Bad Login Attempts | Is Locked | Is Enabled | Is Activated | # |
|-------------|--------------------------|--------------|------------|--------------------|--------------------------|-------------------------------------|-------------------------------------|------|
| Bond, James | claudesimpson@gmail.com | Bond, James | 3/22/2017 | 0 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit |
| Bond, Alvin | alvinb@smarthelocate.com | Bond, Alvin | | 0 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit |

1. Name: The client's name.
2. User Name: The client's user name for access to the Client Portal (usually the client's email address).
3. Contact Card: The contact card to which this client is attached.
4. Last Login: The date on which the client last logged into the Client Portal.
5. Bad Login Attempts: The number of unsuccessful attempts the client has made to log into the Client Portal. After a set number of unsuccessful attempts, the client will be locked out of the Portal.
6. Is Locked: Whether the client is locked out of the Client Portal.
7. Is Enabled: Whether the client's login to the Client Portal is currently enabled.
8. Is Activated: Whether the client has activated his or her token to access the Client Portal.
9. #: The Action column. An Edit button allows the client's profile to be edited.

Editing the Client's Profile

The client's profile can be accessed by clicking on the Edit button on that client's row in the table.

Edit Form

User Name: 1

Contact Card: 2

Bad Login Attempts: 3 Is Locked: 4

Is Enabled: 5 Is Activated: 6

7

1. User Name: The client's user name for access to the Client Portal (usually the client's email address).
2. Contact Card: The contact card to which this client is attached.
3. Bad Login Attempts: The number of unsuccessful attempts the client has made to log into the Client Portal. After a set number of unsuccessful attempts, the client will be locked out of the Portal.
4. Is Locked: Whether the client is locked out of the Client Portal. In the event the client has been locked out of the Portal, uncheck the Is Locked checkbox and click on Update to unlock the client's access. If the cause of the client being locked out of the Portal was having repeated unsuccessful attempts to access the Portal, it may be necessary to issue the client a new token for a password reset. See Password Reset Token Management for details.
5. Is Enabled: Whether the client's login to the Client Portal is currently enabled. Uncheck this checkbox to remove the client's access to the Portal.
6. Is Activated: Whether the client has activated his or her token to access the Client Portal.
7. Update: Button to save any changes made.

Case Statuses

The Case Status feature is more-or-less a timeline that shows the progression of the client's case. Although similar to the "regular" SmartAdvocate Case Statuses that are adjusted by the staff as the case moves forward, the status "Timeline" visible to the client in the Client Portal is different. Case Status in the Client Portal MUST be configured independently. Although you can configure the Case Timeline in Client Portal to correspond with the regular Case Statuses, it is generally more advisable to create "Statuses" for the Timeline that may be somewhat broader and more meaningful to the client. So, for example, we suggest you create Timeline Statuses such as "Initial Investigation," "Client Still Treating," "Submitted Insurance Demand," "Initial Court Conference Held," "Case Scheduled for Trial," etc. Furthermore, you generally do not need to create a corresponding "Timeline" status for the Client Portal for every "regular" status in SmartAdvocate. Multiple SmartAdvocate statuses can be combined and assigned to a single Client Portal status.

| Case Status | Case Status Order | SA Status(es) | Show Start Date | Show Finished Date | Show In Progress Message | Show Completed Message | # |
|--------------------------------------|-------------------|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------|
| Under Consideration | 1 | Pre-Lit 01 - PI New Case - Initial Letters to be Sent, Investigation, Pre-Sign 00 - New Lead. | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| Initial Investigation | 2 | Request Medical Records, Pre-Sign 03 - Under Review by Attorney. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| Preparing Insurance Demand | 3 | Pre-Lit 04 - PI Demand to Be Prepared, Pre-Lit 06 - PI Review for Settle/Suit/Drop/Ref. Out. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| Insurance Demand Submitted | 4 | Pre-Lit 05 - PI Demand Pack Sent Out/Negotiation. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| Under Review for Possible Litigation | 5 | Pre-Lit 06 - PI Review for Settle/Suit/Drop/Ref. Out. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| Lawsuit Being Filed | 6 | LIT 2 - Summons & Complaint To Be Prepared. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| In Litigation | 7 | LIT 3 - Answer(s) Outstanding, LIT 2F - Summons & Complaint Out for Service, LIT 2F - S/C filed but not served, LIT 4 - Discovery, LIT 6 - Depositions and Other Discovery Ongoing. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | edit delete |
| Ready For Trial | 7 | LIT 7 - Case Ready For The Calendar, LIT 8 - Case on the Trial Calendar, LIT 9 - Trial date received from court. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | edit delete |

1. Add Case Status: Button to add a new Case Status for the Client Portal.
2. Case Status: The name of the Case Status for the Client Portal.
3. Case Status Order: The order in which the case statuses will be listed in the Client Portal.
4. SA Status(es): The SmartAdvocate status(es) that correspond to the Client Portal case status.
5. Show Start Date: Whether the date the case went into the Client Portal case status will be shown.
6. Show Finished Date: Whether the date the Client Portal case status ended will be shown.
7. Show In Progress Message: Whether a message will be shown in the Client Portal indicating that the case is currently in the case status.
8. Show Completed Message: Whether a message will be shown in the Client Portal indicating that the case has completed the case status.
9. #: The Action column. An Edit and Delete button.

Add/Edit Case Status

Click on the Edit button in the Action column to edit an existing Case Status, or the Add Case Status button to add a new Case Status.

1. Case Status: The name of the Case Status for the Client Portal.
2. SA Status(es): A dropdown with multi-select checkboxes that allow you to choose multiple SmartAdvocate statuses to correspond to a single Client Portal case status.
3. Case Status Order: The order in which the case statuses will be listed in the Client Portal.
4. Show Start Date: Whether the date the case went into the Client Portal case status will be shown.
5. Show Finished Date: Whether the date the Client Portal case status ended will be shown.
6. Show In Progress Message: Whether a message will be shown in the Client Portal indicating that the case is currently in the case status.
7. Show Completed Message: Whether a message will be shown in the Client Portal indicating that the case has completed the case status.
8. Update: Button to save any changes made to the case status.

Look & Feel

The Look & Feel tab allows you to customize the Client Portal for your firm, as well as your clients' user experience when accessing the Client Portal. A dropdown allows you to choose which resource you wish to alter. The available options are:

CSS File: This option is not currently available in SmartAdvocate, but may be utilized in a future release.

Sign In Logo Image: Allows you to add your firm's logo to the sign-in page of the Client Portal. Click on the File image to locate and upload your logo.

Dashboard Header Logo Image: Allows you to add your firm's logo to the dashboard of the Client Portal. Click on the File image to locate and upload your logo.

Spinner Image: Allows you to change the spinner image used in the Client Portal while pages are loading. Click on the File image to locate and upload your logo.

Document Templates

Document templates are powerful time-savers for any firm. In conjunction with merge codes, they significantly streamline the document generation process. The documents you need for nearly every case your firm handles can be created in just a few clicks; with merge codes, the SmartAdvocate system can even automatically insert case-specific information into a document, making document templates even more versatile. The Document Templates administrative page offers some tools for managing templates and merge codes. However, most of the tools for editing and creating templates and custom merge codes are only available through the SmartAdvocate plugin for Word. See [Merge Codes](#) for details.

The information in Document Templates is divided into five tabs. All five tabs are visible at all times, however the contents of only one tab is visible at a time; click the heading of the tab you want to access to bring up that tab's information. The five tabs are Templates, Template Groups, Template Bundles, Custom Merge Codes, and Builder Merge Codes.

Templates

| Name | Type | Status | Created Date | Modified Date | Actions |
|--|-------------|--------|--------------|---------------|--------------------|
| Case Status | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |
| Investigation, Pre-Lit 01- PI New Case - Initial Letters to be Sent, Pre-Lit | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |
| Case Status Order | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |
| Show Start Date | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |
| Show Finished Date | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |
| Show In Progress Message | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |
| Show Completed Message | Case Status | Active | 11/11/2017 | 11/11/2017 | View, Edit, Delete |

This tab contains a listing of all of the templates in the SmartAdvocate system. The list is in the form of a table, with columns for the name of the

| Template Bundle Name | Is Archived | Action |
|--|-------------------------------------|--------|
| Intake Bundle - General Knee Replacement (Kit plus Letter) | <input checked="" type="checkbox"/> | |
| Intake Bundle - General Hip Replacement (Kit plus Letter) | <input checked="" type="checkbox"/> | |
| ZZZ-Claude-Case Opening | <input type="checkbox"/> | |
| New Case Opening Bundle | <input type="checkbox"/> | |
| New Case Opening Documents | <input type="checkbox"/> | |
| Gibson Singleton | <input checked="" type="checkbox"/> | |
| Mediation | <input type="checkbox"/> | |

This tab contains a listing of all template bundles. Template bundles are collections of templates that appear in the Create Documents page alongside individual document templates. When a template bundle is selected for generation, it creates a document for each of the templates in the bundle. If there is a group of documents that are frequently created at the same time (e.g., a new case intake kit, or a Motion with an affidavit, form of Order, and cover letter), putting them in a bundle saves the time of creating each one separately, and prevents accidentally forgetting to create one of the documents in the group.

The list of bundles is in the form of a table, with columns for the name of the bundle and whether the bundle is marked archived. There is also a column containing, in each row, a pencil icon for editing the row. Above the table is a button allowing you to create a new template bundle.

Clicking the pencil icon in a row will bring up a panel allowing you to change the bundle's name and whether the bundle is marked archived. As with templates, bundles cannot be deleted outright, but marking a bundle archived removes it from the document generation page. The panel also contains a double-list that you can use to add templates to the bundle. Once you have added all the templates you want in the bundle, click Update to save the bundle. Clicking the Create Template Bundle button will bring up the same panel, with the contents blank.

Custom Merge Codes

| Custom Merge Code Name | Description | Type | Is Archived | Action |
|------------------------|--------------------------|------|--------------------------|--------|
| CMC_000001 | CMC_000001 - Description | Text | <input type="checkbox"/> | |
| CMC_000002 | CMC_000002 - Description | Text | <input type="checkbox"/> | |
| CMC_000003 | CMC_000003 - Description | Text | <input type="checkbox"/> | |
| CMC_000004 | CMC_000004 - Description | Text | <input type="checkbox"/> | |
| CMC_000005 | CMC_000005 - Description | Text | <input type="checkbox"/> | |
| CMC_000006 | CMC_000006 - Description | Text | <input type="checkbox"/> | |
| CMC_000007 | CMC_000007 - Description | Text | <input type="checkbox"/> | |
| CMC_000008 | CMC_000008 - Description | Text | <input type="checkbox"/> | |
| CMC_000009 | CMC_000009 - Description | Text | <input type="checkbox"/> | |
| CMC_000010 | CMC_000010 - Description | Text | <input type="checkbox"/> | |
| CMC_000011 | CMC_000011 - Description | Text | <input type="checkbox"/> | |
| CMC_000012 | CMC_000012 - Description | Text | <input type="checkbox"/> | |
| CMC_000013 | CMC_000013 - Description | Text | <input type="checkbox"/> | |
| CMC_000014 | CMC_000014 - Description | Text | <input type="checkbox"/> | |
| CMC_000015 | CMC_000015 - Description | Text | <input type="checkbox"/> | |
| CMC_000016 | CMC_000016 - Description | Text | <input type="checkbox"/> | |
| CMC_000017 | CMC_000017 - Description | Text | <input type="checkbox"/> | |
| CMC_000018 | CMC_000018 - Description | Text | <input type="checkbox"/> | |
| CMC_000019 | CMC_000019 - Description | Text | <input type="checkbox"/> | |
| CMC_000020 | CMC_000020 - Description | Text | <input type="checkbox"/> | |

This tab contains a listing of all custom merge codes. For an explanation of custom merge codes, see [Creating and Using Custom Merge Codes](#). The list of custom merge codes is in the form of a table, with columns for the merge code's name, description, and type, as well as whether the merge code is marked archived. There is also a column containing, in each row, a pencil icon for editing the row.

Clicking the pencil icon in a row will bring up a panel allowing you to change the merge code's name, description, and type, as well as whether the merge code is marked archived. Custom merge codes cannot be deleted outright but marking a custom merge code archived removes it from the list of available codes when creating builder merge codes. Click Update to save your changes or Cancel to discard them and close the panel.

Builder Merge Codes

| Builder Merge Code Name | Description | Type | Is Archived | Action |
|-------------------------|--------------------------|------|--------------------------|--------|
| BMC_000001 | BMC_000001 - Description | Text | <input type="checkbox"/> | |
| BMC_000002 | BMC_000002 - Description | Text | <input type="checkbox"/> | |
| BMC_000003 | BMC_000003 - Description | Text | <input type="checkbox"/> | |
| BMC_000004 | BMC_000004 - Description | Text | <input type="checkbox"/> | |
| BMC_000005 | BMC_000005 - Description | Text | <input type="checkbox"/> | |
| BMC_000006 | BMC_000006 - Description | Text | <input type="checkbox"/> | |
| BMC_000007 | BMC_000007 - Description | Text | <input type="checkbox"/> | |
| BMC_000008 | BMC_000008 - Description | Text | <input type="checkbox"/> | |
| BMC_000009 | BMC_000009 - Description | Text | <input type="checkbox"/> | |
| BMC_000010 | BMC_000010 - Description | Text | <input type="checkbox"/> | |
| BMC_000011 | BMC_000011 - Description | Text | <input type="checkbox"/> | |
| BMC_000012 | BMC_000012 - Description | Text | <input type="checkbox"/> | |
| BMC_000013 | BMC_000013 - Description | Text | <input type="checkbox"/> | |
| BMC_000014 | BMC_000014 - Description | Text | <input type="checkbox"/> | |
| BMC_000015 | BMC_000015 - Description | Text | <input type="checkbox"/> | |
| BMC_000016 | BMC_000016 - Description | Text | <input type="checkbox"/> | |
| BMC_000017 | BMC_000017 - Description | Text | <input type="checkbox"/> | |
| BMC_000018 | BMC_000018 - Description | Text | <input type="checkbox"/> | |
| BMC_000019 | BMC_000019 - Description | Text | <input type="checkbox"/> | |
| BMC_000020 | BMC_000020 - Description | Text | <input type="checkbox"/> | |

This tab contains a listing of all builder merge codes. For an explanation of builder merge codes, see [Creating and Using Builder Merge Codes](#). The list of builder merge codes is in the form of a table, with columns for the merge code's name, description, and type. There is also a column containing, in each row, a pencil icon for editing the row, and a red X icon for deleting the row (there will be a confirmation message first to avoid accidental deletion). Clicking the pencil icon in a row will bring up a panel allowing you to change the builder merge code's name, description, and type. The panel also contains a double-list that you can use to add custom merge codes to the builder merge code. Once you have added all the custom merge codes you want to be in the builder merge code, click Update to save the builder merge code. Clicking the Create Builder Merge Code button will bring up the same panel, with the contents blank.

Learn more:

[Document Search](#)

[Email/Note/Appointment/View Templates](#)

| Name | Subject | Email | Note | Appointment | Action |
|---------------------|---|-------|------|-------------|--------|
| Casefile | Meeting Request (Meeting) - [Name] ([Phone]) - [Address] ([City]) - [State] ([Zip]) - [Country] ([Country]) | Yes | Yes | Yes | |
| ...New Emails | Get more emails | Yes | Yes | Yes | |
| Appointment Summary | Appointment Summary | Yes | Yes | Yes | |

| Record Type | Case Types | Case Groups | Template | Actions |
|--|------------------------------------|---------------------------|---|---|
| Abstract Records Only | All | All | Medical Records Request - Hospital - Abstract Record |   |
| Abstract Records Only (Inpatient) | All | All | Medical Records Request - Hospital - Abstract Record - Inpatient |   |
| Billing Records | All | All | Medical Billing Request - Doctor or Hospital |   |
| Clex (Fax Only) | All | All | Medical Records Request - admission records only |   |
| Custom Request | All | All | Medical Records - Custom Request |   |
| Discharge Summary | Ability - Not Death, Resuscitation | All | Medical Records Request - Hospital |   |
| Doctors Records - No Fault | All | Auto Accidents | Medical Records Request - Doctor - No Fault |   |
| Doctors Records (Mass Torts) | All | All | Medical Records Request - Doctor - Mass Torts |   |
| Doctors Records (Single Event) | All | All | Medical Records Request - Doctor |   |
| Follow Up Request | All | All | Medical Records Request - Follow Up Request |   |
| Hospital Records | All | All | Medical Records Request - Hospital |   |
| Hospital Records - No Fault | All | Auto Accidents | Medical Records Request - Hospital - No Fault |   |
| ID, TH, TP, DS, HRI | All | All | Medical Records Request - Hospital |   |
| Implant Chart Sticker Op Report | All | Defective Medical Devices | Medical Records Request - Implant Op Report Chart Sticker Records |   |
| Medtronic - Chart Stickers | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Charts & Stickers |   |
| Medtronic - Complete Records (Doctor) | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic - Dr Off Progress Notes & Image Rpts |   |
| Medtronic - Complete Records (Hospital) | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Confirmed Case Hospital Records |   |
| Medtronic - Confirmed Case - (Hospital Intra Op &) | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Conf Case (Hosp) IntraOp & Image Rpts |   |
| Medtronic - Dr Off Progress Notes & Image Rpts | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic - Dr Off Progress Notes & Image Rpts |   |
| Medtronic - Films & Image Records | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Films |   |

Email templates are useful tools that simplify the process of writing and sending emails. Any form emails that your firm sends out can be saved as templates, and you can include [Merge Codes](#) to have SmartAdvocate automatically fill in case-specific information. Similarly, note templates allow you to adapt commonly used notes to each individual case. (Quick Notes are useful for notes that do not include case-specific information, but note templates are necessary for those that do.) The Email/Note Templates administrative page is where email and note templates are created and managed. All of your email and note templates are listed in a table, with columns for the name of the template, the subject line of the template, and whether the template is for emails and/or notes. There is also a column containing a right-click icon in each row. Clicking the icon, or right-clicking anywhere in the row, brings up the options Edit and Delete. Delete lets you delete the template (there will be a confirmation message first to avoid accidental deletion), and Edit brings up the editing panel. To the upper left of the table is the Add Email/Note Template button, which brings up a blank editing panel for creating a new template.

The editing panel contains fields for the template name and subject, the note type (only usable for note templates) a checkbox allowing you to select the template as the default template for new emails (only usable for email templates), and a text editing window with text styling options for the body of the email. There is also a button labeled Insert Merge Code. Clicking this button brings up a table containing an abridged list of merge codes suitable for use in an email or note. Before opening the table of merge codes, set your text editing cursor to the location in the subject or body where you would like to include a merge code. Then open the table, find your desired merge code, click the code, then click Insert to insert it at that point in the text. Click Close to close the table.






















Email templates are used in the [Mass Emailing](#) screen and when sending a case email. Note templates are used when adding a case note.

Medical Record Request Types

You can use the Medical Record Request Types administrative page to manage the types of medical records you might request in association with different case types and groups. You can also link a document template with each record type to streamline the creation of the record request document. (You will need to have already created the document template in order to link it with a record type.) The record types are listed in a table, with the following data columns:

1. Record Type: The name of the record type.
2. Case Types: A list of all the case types for which this record type is available when creating a new medical record request. If this column contains "All," all case types are included.
3. Case Groups: A list of all the case groups for which this record type is available when creating a new medical record request. If this column contains "All," all case groups are included.
4. Template: The name of the template (including template bundles) linked to the record type. This is the template from which the request will be generated if you select Update & Generate when creating a new medical record request.

You can create a new request type on this page. The add/edit form allows you to change the record type, select the case types from a list of all case types, select the case groups from a list of all case groups, and select a template from the list of all templates. Notes: if you select none of the case types, or none of the case groups, the respective columns will appear as All. Additionally, all templates are available for selection, not just those that are not archived.

| Record Type | Case Types | Case Groups | Template | Actions |
|--|------------------------------------|---------------------------|---|---|
| Abstract Records Only | All | All | Medical Records Request - Hospital - Abstract Record |   |
| Abstract Records Only (Inpatient) | All | All | Medical Records Request - Hospital - Abstract Record - Inpatient |   |
| Billing Records | All | All | Medical Billing Request - Doctor or Hospital |   |
| Clex (Fax Only) | All | All | Medical Records Request - admission records only |   |
| Custom Request | All | All | Medical Records - Custom Request |   |
| Discharge Summary | Ability - Not Death, Resuscitation | All | Medical Records Request - Hospital |   |
| Doctors Records - No Fault | All | Auto Accidents | Medical Records Request - Doctor - No Fault |   |
| Doctors Records (Mass Torts) | All | All | Medical Records Request - Doctor - Mass Torts |   |
| Doctors Records (Single Event) | All | All | Medical Records Request - Doctor |   |
| Follow Up Request | All | All | Medical Records Request - Follow Up Request |   |
| Hospital Records | All | All | Medical Records Request - Hospital |  |
| Hospital Records - No Fault | All | Auto Accidents | Medical Records Request - Hospital - No Fault | |
| ID, TH, TP, DS, HRI | All | All | Medical Records Request - Hospital | |
| Implant Chart Sticker Op Report | All | Defective Medical Devices | Medical Records Request - Implant Op Report Chart Sticker Records | |
| Medtronic - Chart Stickers | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Charts & Stickers | |
| Medtronic - Complete Records (Doctor) | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic - Dr Off Progress Notes & Image Rpts | |
| Medtronic - Complete Records (Hospital) | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Confirmed Case Hospital Records | |
| Medtronic - Confirmed Case - (Hospital Intra Op &) | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Conf Case (Hosp) IntraOp & Image Rpts | |
| Medtronic - Dr Off Progress Notes & Image Rpts | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic - Dr Off Progress Notes & Image Rpts | |
| Medtronic - Films & Image Records | Medtronic Infuse Bone Graft | All | Medical Records Request - Medtronic Films | |

Jump to Utilizing the Medical Provider Referral Page:

Medical Provider Referral Report

Notifications Setup

The Notifications Setup administrative page determines whether Critical Deadlines and Statutes of Limitations are added to users' calendars. If set to add Critical Deadlines and Statutes of Limitations to calendars, users will receive calendar invitations via email which, once accepted, will add the deadlines to their calendars.

The Notifications Setup page consists of the following options:

- A checkbox indicating whether users will receive a calendar invitation for Critical Deadlines.
- A checkbox indicating whether users will receive a calendar invitation for Statutes of Limitations.
- Calendar Event Default Time: The default time when the Critical Deadlines and Statute of Limitations will be added to the calendar.
- Select Case Roles to be Notified: Dropdown, allowing you to choose multiple case roles to receive the calendar invitations for Critical Deadlines and Statute of Limitations.

Quick Injuries

The Quick Injury system in SmartAdvocate allows you to quickly and efficiently record injuries when performing intake or updating a case's injury report. Each case type can have any number of Quick Injuries associated with it, which are the injuries likely to present in cases of that type. The [Case Wizard](#) and the [Injuries](#) case page both make the Quick Injuries from that case type available for selection, saving you the time of typing each injury out manually. The Quick Injuries administrative page is where you can create and manage Quick Injuries. Quick Injuries is divided into two tabs, only one of which is visible at a time; click the heading of the tab you want to access to bring up that tab. The tabs are Injury and Case Type. The information in both is the same, but the way it is presented is reversed: Injury displays a table where each Quick Injury is paired with the list of case types that use it; Case Type displays a table where each case type is paired with the list of Quick Injuries that it uses.

Injury

This tab contains a table listing all of the Quick Injuries in the SmartAdvocate system. The table's columns are:

- Injury: The name of the Quick Injury.
- Case Types: A list of all the case types that make that Quick Injury available.
- Actions: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can create a new Quick Injury in this tab; the panel for doing so has a text input field for the injury name and a multiselect checkbox dropdown of all the case types in the system.

| Injury | Case Types | Actions |
|----------------------|--|-----------------|
| Accidental Underdose | Medication - Not Death | [Edit] [Delete] |
| Asthma - Death | Medication - Not Death | [Edit] [Delete] |
| Asthma - Not Death | Medication - Not Death | [Edit] [Delete] |
| Bladder Cancer | Benzene - Not Death, Benzene - Death | [Edit] [Delete] |
| Blood in the Urine | Benzene - Not Death, Benzene - Death, Thalidomide | [Edit] [Delete] |
| Bone Fractures | Oral Sodium Phosphate (OSP) Products | [Edit] [Delete] |
| Bone Injuries | Phallos | [Edit] [Delete] |
| Breast Cancer | Depression - Not Death, Depression - Death, Pain - Not Death, Pain - Death | [Edit] [Delete] |
| Cardiac Issues | De Vries Robot Surgery, TigerPaw Surgical Shears, Bear Hugger Heating Blanket, Labor Law | [Edit] [Delete] |
| Chronic Pain | Phosor - Not Death, Phosor - Death | [Edit] [Delete] |
| Chronic Pain - Death | Kugel Mesh Patch - Not Death, Kugel Mesh Patch - Death, Farm Accident | [Edit] [Delete] |

Case Type

This tab contains a table listing all of the case types in the SmartAdvocate system. The table's columns are:

- Case Type: The name of the case type.
- Injury: A list of all the Quick Injuries that the case type makes available.
- Actions: An action column containing an [Edit icon](#) and a [Copy icon](#). Clicking the Copy icon brings up a panel allowing you to efficiently copy the list of Quick Injuries from one case type to other case types. The panel contains an immutable field with the source case type listed, a checkbox-select dropdown of Quick Injuries with the Quick Injuries associated with the source case type preselected, and a checkbox-select dropdown of case types. You can add Quick Injuries to the preselected list and/or remove them. Select the desired list of Quick Injuries and the desired list of case types; then click Update to copy the Quick Injury list to the case types. Note: The selected Quick Injury list will replace, *not* be added to, any Quick Injuries already associated with the target case type(s).

You cannot create new Quick Injuries or case types in this tab, and you cannot delete case types in this tab (see [Case Types](#) to delete case types).

| CaseType | Injury | Actions |
|---------------------------|---|---------------|
| Asthma - Death | Liver Failure, PPHs, Breast Cancer, Heart Attack, Death, Bone Fractures, Hemorrhagic Stroke, Bladder Cancer, Blood in the urine, Pain while urinating, Frequent urination, Feeling of need to urinate without results, Urinary tract infections, Pain in back or lower abdomen, Painful Urination, Congestive Heart Failure(CHF), Diabetes Mellitus (IDDM), Cataracts, Prostate Cancer, Bone mineral loss, Bone loss, Cancer - Liver, Liver Injury | [Edit] [Copy] |
| Asthma - Not Death | Liver Failure, PPHs, Breast Cancer, Heart Attack, CVA, Myocardial infarction, Bone fractures, Bladder Cancer, Blood in the urine, Pain while urinating, Frequent urination, Feeling of need to urinate without results, Urinary tract infections, Pain in back or lower abdomen, Painful Urination, Congestive Heart Failure(CHF), Diabetes Mellitus (IDDM), Cataracts, Prostate Cancer, Bone mineral loss, Bone loss, Cancer - Liver, Liver Injury | [Edit] [Copy] |
| Bladder Cancer | Heart Attack, Death | [Edit] [Copy] |
| Blood in the Urine | Heart Attack | [Edit] [Copy] |
| Bone Fractures | Heart Attack, Death | [Edit] [Copy] |
| Bone Injuries | Asthma, Death, Exacerbation of Asthma | [Edit] [Copy] |
| Breast Cancer | Asthma, Exacerbation of Asthma | [Edit] [Copy] |
| Breast Cancer - Death | Hearing Loss, Removal Surgery, Pain, Bacterial Meningitis, Tissue Death, Loud Sounds | [Edit] [Copy] |
| Breast Cancer - Not Death | | [Edit] [Copy] |

Refer-Out Rules

The Refer-Out Rules page contains a list of firms to which your firm commonly refers cases. It is used when marking a case as referred out from the [Retailer/Referral](#), using the Select Refer-Out Firm button. This feature makes referring cases to your partner firms quick, consistent and efficient.

The Structure of This Page

| NEW RULE 1 | Firm Name 2 | States 3 | Included Case Types 4 | Excluded Case Types 5 | Emails 6 | Priority 7 | Comments 8 | Portal 9 | Actions 10 |
|------------|---------------------------|----------|---|-----------------------|--------------------------|------------|------------|----------|------------|
| | | | | | | | | | |
| | Best Law | All | | | | Low | | | |
| | Castle & Alamos, LLP | All | Bankruptcy, Class Actions, Construction Accidents, Criminal Defense, Defective Medical Devices, Defective Pharmaceuticals, Family Law, General Practice, Immigration, | | joseph@smartadvocate.com | Low | | Link | |
| | Devey Cheatem & Howe | All | Auto Accidents, Auto - Prop Damage Only | | | Low | | Link | |
| | Devey Cheatem & Howe | All | Airplane Accident, Auto Accident (s), Auto Accidents, CRG - Auto Accidents, | | harry@smartadvocate.com | High | | Link | |
| | Manning & Associates, LLC | All | Bankruptcy, | | | Low | | | |

1. New Rule button: Button used to create a new refer-out rule. See Adding A Refer-Out Rule.
2. Firm Name: The name of the law firm the rule was created for.
3. States: The states that the law firm will accept cases from.
4. Included Case Types: The groups/types of cases this firm accepts.
5. Excluded Case Types: The types of case within a particular case group that the firm does not accept.
6. Emails: The email(s) that will be used to contact that firm and to send referral summaries to.
7. Priority: The priority with which cases should be referred to that firm, ranging from Low to High.
8. Comments: Any comments related to referring cases to this firm.
9. Portal: The link to the Referred Case Portal for this firm. For more on this please see [Referral Law Firm Portal](#).
10. Actions: An action column containing an [Edit Icon](#), a [Delete Icon](#) and a [Refer Out Portal icon](#).

Editing a Refer-Out Rule

To edit a refer-out rule:

- Click the [Edit Icon](#) in the Action column of the row representing the rule you wish to edit. This will bring up an Add/Edit panel for refer-out rules, with the existing information filled in.
- Fill the fields in with your desired information. See [The Add/Edit Refer Out Rule Panel](#) for details about the fields.
- Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Refer-Out Rule

To delete a refer-out rule:

- Click the [Delete icon](#) in the Action column of the row representing the rule you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the rule, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Refer-Out Rule

To add a new refer-out rule:

- Click the New Rule hypertext. This will bring up an Add/Edit panel for refer-out rules, blank except for defaults.
- Fill the fields in with your desired information. See [The Add/Edit Refer Out Rule Panel](#) for details about the fields.
- Click Save to save the rule and close the panel.
- If you decide you do not wish to save the rule, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Refer Out Rule Panel

The Add/Edit Refer Out Rule Panel allows you to fill in the details of a refer-out rule. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Refer Out Rule

Case Groups: 1

Exclude Types: 3

Include Types: 2

Priority: 4

The screenshot shows a web form with the following elements:

- 5**: Firm: * Best Law (dropdown)
- 6**: State: All States (dropdown)
- 7**: Default Fee: Percentage (radio button selected)
- 8**: Default Fee: Amount (radio button unselected)
- 9**: Email Contacts table with columns #, Name, and Email. The table is empty, showing "No data to display".
- 10**: Comments text area.

Buttons for "Edit Contacts" and "Refresh" are located above the Email Contacts table. "SAVE" and "CANCEL" buttons are at the bottom right.

1. Case Groups: Dropdown, allowing you to choose multiple case groups to which this rule applies (in addition to the types selected in Include Types).
2. Include Types: Dropdown, allowing you to choose multiple case types to which this rule applies (in addition to the groups selected in Case Groups).
3. Exclude Types: Dropdown, allowing you to choose multiple case types to which this rule does not apply, even if selected in Case Groups or Include Types).
4. Firm: Contact-list dropdown, from which you are required to choose the law firm to which cases can be referred.
5. State: Checkbox-select dropdown, which determines the case states to which this rule applies. If this field is left blank when the rule is saved, All States will be automatically selected.
6. Priority: Dropdown, allowing you to choose the priority level of the firm among the possible options when making a referral. If this field is left blank when the rule is saved, Low will be automatically selected.
7. Default Fee [Percentage]: A dropdown allowing you to select the default percentage of the fee to be assigned to cases referred out to that firm.
8. Default Fee [Amount]: A field allowing you to add the default amount of the fee to be assigned to cases referred out to that firm.
9. Email Contacts: Check-box select list, which allows you to choose the email addresses to which the referral summary of the case will be sent when making the referral. You can choose from each employee of the law firm in the Firm field with a primary email address in their [Contact Card](#). Clicking the Edit Contacts hypertext will open the [Contact Card](#) of the law firm in the Firm field, allowing you to add employees. Clicking the Refresh hypertext will repopulate the list, in case you have added a new employee using the Edit Contacts hypertext.
10. Comments: Any comments about the rule.

Referral Law Firm Portal

This page is currently under construction. Check back for updates!

Stages Setup

Stages in SmartAdvocate are collections of statuses (primary statuses, specifically; see [Status Setup](#) for details). They are used to signify case progress at a broader level than statuses; e.g., moving from the Pre-Litigation stage to the Litigation stage is a larger step, and a more significant difference, than moving from status to status within the Pre-Litigation stage. The Stages Setup administrative page is where you can manage stages. The page contains a double-list below a dropdown containing a list of all the stages in the SmartAdvocate system. Selecting a stage from this dropdown will populate the double-list with statuses; all the statuses within the selected stage will be in the right list, and all remaining statuses in the SmartAdvocate system will be in the left list. You may then use the double-list to add or remove statuses from the selected stage as you see fit. Note: It is strongly recommended that you not include the same status in two different stages, as this could impact (and cause errors or inaccuracies) in reports and other functions within SmartAdvocate.

You can also add or remove stages, or change the name of a stage, by clicking the link "Add/Update Stages" link above the left list. This will bring up a panel containing a small table listing all of the stages, with a column for the stage's name and an action column containing an [Edit icon](#) and a [Delete icon](#). You can also add a new stage from this panel by clicking the "Add New Stage" link. The add/edit form contains only a text input field for the stage's

name. Note: Any changes you make in this panel will not immediately be reflected in the Stages Setup page when you close the panel. You must refresh the page to make the changes appear.

Stage Setup [Add/Update Stages](#)

Stage: 02 Pre-Lit

- 341 Meeting Scheduled
- Active
- Appeal 01 - Verdict obtained
- Appeal 02 - Appeal from Verdict
- Appeal 03 - Appeal from Motion
- Appeal 04 - to be Prepared
- Appeal 05 - to be Served
- Appeal 06 - Transcript to be Settled
- Appeal 07 - Oral Arguments Scheduled
- Appeal 08 - Decision Rec'd
- Arbitration Held
- Binding Liability Arbitration Scheduled
- Case against the MVAIC

ADD >

ADD ALL >>

< REMOVE

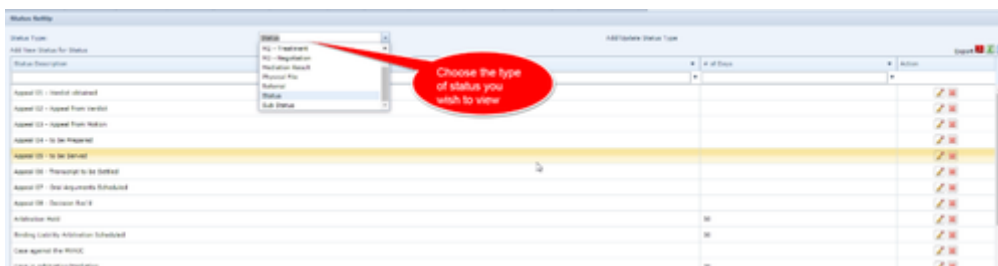
<< REMOVE ALL

- Pre-Lit .3 Under Consideration - Retainer/Police Rpt REC'D
- Pre-Lit 01- MT New Case - Initial Letters to be Sent
- Pre-Lit 01- PI New Case - Initial Letters to be Sent
- Pre-Lit 02 - PI Investigation/Client Contact
- Pre-Lit 02A - PI Investigation Ongoing
- Pre-Lit 03 - PI Gathering Medical Records
- Pre-Lit 04 - PI Demand to Be Prepared
- Pre-Lit 05 - PI Demand Pack Sent Out/Negotiation
- Pre-Lit 06 - PI Review for Settle/Suit/Drop/Ref. Out
- Pre-Lit 07 - PI Case To Be Referred Out
- Pre-Lit 08 - PI Case To be Dropped

SAVE

CANCEL

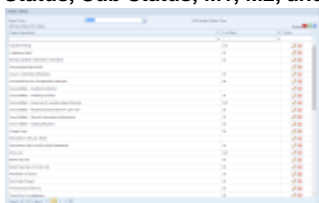
Status Setup



Statuses in SmartAdvocate are the most important way of tracking the overall progress of your cases. They are useful both to your staff as a quick indicator of the current phase of the case, and to the SmartAdvocate system itself, which uses various statuses as triggers for certain dashboards and other automatic updates. You can add, remove, or edit a case's status in its [Case Summary](#) page, and certain actions (such as retaining a case) will automatically update its status for you. There are several types of statuses in SmartAdvocate: in addition to the primary case status (generally simply titled Status), there are sub-statuses (which can be used, for example, to add more granular detail to the current Status, or to note an aspect of the case that is less about the linear progress of the case than Statuses are) and more. The Status Setup administrative page is where you can manage statuses and status types. The page contains a table below a dropdown containing a list of all the status types in the SmartAdvocate system. Selecting a status type from this dropdown will populate the table with all the statuses of that type. The table's columns are:

1. Status Description: The name of the status.
2. # of Days: The expected number of days the case will remain in the status. When a case is changed to this status in the Case Summary screen, the Expected # of Days numeric input will default to whatever number is in this column.
3. Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can also create new statuses in this page. The add/edit form contains text input fields for the name of the status and the number of days. You can also add or manage status types by clicking Add/Update Status Type, which will bring up a panel containing a table listing all of the status types, with a column for the status type's name and an action column containing an edit icon and a delete icon. You can add a new status type from this panel by clicking Add New Status Type. The add/edit form contains only a text input field for the status type's name. **Important note:** Several of the existing status types are tied to automatic actions in the SmartAdvocate system and **must not** be deleted. The names can be edited, although it is generally recommended that you, at a minimum, preserve the default name as a prefix for your new one to avoid confusion. **The essential status types are Status, Sub Status, M1, M2, and M3.**



Make use of Sub-Statuses in SmartAdvocate

System Parameters (Internal)

The System Parameters (Internal) page contains a list of various settings of your SmartAdvocate system, primarily relating to server and network configuration. Unlike the main System Parameters page, which deals more with interface settings that can be changed to suit the particular needs of your firm, this page generally contains settings that are fundamental to the system and are set when your system is installed; they should not be changed unless your firm's underlying network or server setup changes. If you have any questions regarding any of these parameters, please contact the SmartAdvocate support team at support@smartadvocate.com. Since these features are primarily used for your IT team, or the SmartAdvocate team descriptions of these items are not provided.

Text Message Templates

With the increasing importance of phones in daily life, you may find that sending text messages to clients and other contacts offers a more effective means of communication and faster response rate than email or certainly standard mail, and a more efficient option than a phone call. Text message templates can help standardize and simplify the process of writing and sending out text messages. Texts that you frequently send can be saved as templates, and you can include [Merge Codes](#) to have SmartAdvocate automatically fill in case-specific information. The Text Message Templates administrative page is where text message templates are created and managed. All of your text message templates are listed in a table, with columns for the name of the template and the content of the text message. There is also a column containing a right-click icon in each row. Clicking the icon, or right-clicking anywhere in the row, brings up the options Edit and Delete. Delete lets you delete the template (there will be a confirmation message first to avoid accidental deletion) and Edit brings up the editing panel. To the upper left of the table is the Add Template button, which brings up a blank editing panel for creating a new email template.

The add/edit form contains text input fields for the template name and content of the text message. There is also a button labeled Insert Merge Code. Clicking this button brings up a table containing an abridged list of merge codes suitable for use in a text message. Before opening the table of merge codes, set your text editing cursor to the location in the text message where you would like to include a merge code. Then open the table, find your desired merge code, click the code, then click Insert to insert it at that point in the text. Click Close to close the table. Be cautious about the length of the message, however; the permissible length of text messages depends upon the text message provider used by your firm. Limits may range from as few as 160 characters to up to 5,000 characters. Some merge codes may be replaced with large amounts of text, bringing a message above the character limit. The template edit form indicates the number of available characters remaining, depending on the text message provider used, but this will not include the information that replaces the merge codes in the message.

Text message templates are used in the [Mass Texting](#) screen and when [Sending SMS Text Messages](#).

| Texting Templates | | Export | Action |
|---------------------------------|--|--------|--------|
| Name | Text | | |
| --HD Presign- Carr Reach Client | Hi <[CA-PRIMARY-PL-FIRSTNAME]>, This is <[CA-ATTY-NAME]> from <[FIRM-NAME]>. We have been trying to reach you about your case. Please call us immediately at <[FIRM-PHONE]>. Thank you. | | |
| Appointment Reminder | Hi <[CA-PRIMARY-PL-FIRSTNAME]>, This is a reminder of your upcoming appointment set for <[APPNT-NEXT-CASE-DATE]> at <[APPNT-NEXT-CASE-LOCATION]>. -- <[FIRM-NAME]> | | |
| Appointment Reminder (New) | This is a friendly reminder: You have an appointment coming up. Subject: <[APPNT-NEXT-CASE-SUBJECT]> Date: <[APPNT-NEXT-CASE-DATE]> Time: <[APPNT-NEXT-CASE-TIME]> <[APPNT-NEXT-CASE-COMMENTS]> Subject: <[APPNT-NEXT-CONTACT-SUBJECT]> Date: <[APPNT-NEXT-CONTACT-DATE]> Time: <[APPNT-NEXT-CONTACT-TIME]> <[APPNT-NEXT-CONTACT-COMMENTS]> Subject: <[APPNT-NEXT-PLAINTIFF-SUBJECT]> Date: <[APPNT-NEXT-PLAINTIFF-DATE]> Time: <[APPNT-NEXT-PLAINTIFF-TIME]> <[APPNT-NEXT-PLAINTIFF-COMMENTS]> This is a friendly reminder: You have an appointment coming up. | | |

Picklist Maintenance

The Picklist Maintenance page allows you to customize numerous aspects of the SmartAdvocate system. In particular, the page allows you to edit the contents of most of the [Dropdown](#) fields in various panels. The page contains an alphabetical list of categories in a pane on the left. Clicking any of these categories brings up a corresponding list in the pane on the right. Most of the lists represent options available in particular dropdown fields; however, some of the lists represent more essential information about your firm or case-management process. Nearly all of the lists can be customized by adding, editing, or deleting items.

Note that when searching for an item using the Filter field, after typing your search term you must click on the magnifying glass icon or press the Enter key on your keyboard to effectuate the search.

SmartAdvocate Cases: Open Closed All Case # / Plaintiff

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools Reports Admin Favorites Help My SmartAdvocate

Filter:

Picklist Maintenance Export

| Description | Incident Type | Limit Status | Statuses | Action |
|------------------------|---------------------|--------------|--|--------|
| Admin Cases | Client | Yes | Active, Suspended, That, Survey Received, Survey Sent, Being Considered for the Panel, Not on the Panel, On the Panel | |
| Airplane Accident | General Negligence | Yes | Pre-Lit 01- PI New Case - Init, Pre-Lit 02 - MT Additional Inf, Pre-Lit 02 - PI Investigation/, Pre-Lit 04 - PI Demand to Be P, Pre-Lit .3 Under Consideration, Pre-Lit 04 - MT POU Ordered, Pre-Lit .1 - Retainer rec'd -, Pre-Lit 03 - PI Gathering Medi, Pre-Lit 03 - MT POU Needed, Pre-Lit 01 - MT To Be Opened, A - Top Case, B - Good Case | |
| Auto Accident (s) | Auto Accident | No | Survey Received, Survey Sent | |
| Auto Accidents | Auto Accident | No | AARP Mobile Home Insurance, Survey Received, Survey Sent | |
| Bankruptcy | | No | | |
| Basic | General Negligence | No | | |
| Civil Rights | General Negligence | No | | |
| Class Actions | Product Liability | No | | |
| Construction Accidents | General Negligence | No | | |
| Criminal Defense | Criminal Defense | No | | |
| CRS - Auto Accidents | CRS - Auto Accident | No | File To Be Closed, Closed for no contact | |
| | | | LIT 6 - Depositions and Other , Appeal 02 - Appeal from Verdic, Appeal 03 - Appeal from Motion, Case on trial calendar, Case settled 05 - Ready to Dis, Case settled 06 - Funds Disbur, case settled, money rec'd-open, Case Stayed, Discovery, Demand Made, IME Scheduled, IME Completed, LIT 2 - Summons & Complaint To, LIT 3 - Answer(s) Outstanding, LIT 2F - Summons & | |

Page 1 of 1 (36 items) < 1 >

Basic Picklist Table

Many of the lists on this page have the same table structure: a column with the heading “Descriptions,” containing the text of each individual option, and a column with the heading “Action,” containing an [Edit icon](#) () and a [Delete icon](#) () . Some of the options are mandatory within SmartAdvocate and thus cannot be deleted. You can, however, edit most of these options by clicking on the “Edit” icon. You can add a new row to the table by clicking the Add New Item button. Most add/edit forms have a single field, allowing you to name the new item, or rename an existing one. Most such forms have two fields, a [Text input](#) field for item Description, and a [Dropdown](#) field, which permits you to choose the primary type/category under which the new or edited item will be created.

Accounting Account Types

This list contains the various account types that can be assigned to your Bank Accounts. If your firm has integrated SmartAdvocate with QuickBooks, this will appear in the Type Column when looking the Account Chart. It is a [Basic Picklist Table](#).

Accounting Bank Accounts

This list contains the different bank accounts that may be used for case finances. The Bank Accounts created here can be found in the Bank Account dropdown when creating a New Disbursement on the [Disbursements](#) case page. If your firm has integrated SmartAdvocate with QuickBooks this will appear in the Name column. The table contains three columns:

1. Description: A description of the bank account.
2. Type: The type of bank account it is.
3. Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Description and a dropdown for the Account Type (pulling from the [Accounting Account Types](#) picklist).

Actions

This list contains the actions you might take in preparation for trial. It is used in the Action dropdown in the [Trial Prep](#) case page. It is a [Basic Picklist Table](#).

Appointment Activity Categories

This list contains the categories under which Activity Types are classified and is used when Activity Types are created. An action column contains an edit icon and a delete icon. You can add a new item by clicking on the Add New Item button. The sole parameter is the name of the Activity Category. It is strongly recommended that you neither delete or edit the names of the Appointment Activity Categories provided with the system (Case-Related Appointment, Non-Case Related Appointment, and Personal Appointment), as they are utilized by the system for other purposes.

Appointment Status

This list contains the statuses available for calendar appointments. An Appointment Status must be chosen when creating an appointment, and can be edited to reflect a change in status (i.e.: when an appointment is completed or adjourned). All calendar entries are color coded based upon their status. The statuses themselves cannot be edited, however you can change the color assigned to each status here.

Activity Codes

This list contains activities for use when you want to track your time. It is used in the Activity dropdown in the [Time Tracking](#) case page. However, not every item in this list will necessarily appear in the Activity dropdown; individual activity codes only appear for certain case types. See the [CaseType-ActivityCode Relationships](#) picklist for selecting the set of case types for which individual activity codes appear. This list is also used to define the contents of the CaseType-ActivityCode Relationships picklist. The rows in the CaseType-ActivityCode Relationships list cannot be directly added to or deleted; addition or deletion must be done through this Activity Codes list. The table has two columns: Activity Codes, for the description of the activity, and Action, an action column containing an [Edit icon](#) and a [Delete icon](#). You can add a new row to the table by clicking the Add New Item button. The add/edit form has only one field, a [Text input](#) field for naming the Activity Codes.

Activity Types

This list is used primarily for types of appointments, but also contains types of recreational activities (used primarily for clients who have partially or completely lost the ability to perform those activities as a result of their injuries – see [School/Other Activities](#) for details). The list also gives the appearance of being used for types of employment and activities for which you might use time tracking, but as of now there is nowhere in the system that uses those categories (the [Employment](#) page has no section for these types, and the [Time Tracking](#) page uses the [Activity Codes](#) picklist). The four functional categories of activities in this list are Case-Related Appointment, Non-Case Related Appointment, Other Activity, and Personal Appointment. Non-Case Related Appointment and Personal Appointment activities are used in the Activity Type dropdown when creating a new appointment from the [Office Calendar](#). Which category is used depends on whether the Personal checkbox is deselected or selected, respectively. Case-Related Appointment activities are used in the Activity Type dropdown when creating a new appointment from the [Case Calendar](#) (or directly from a case's [Quick Action Tool Bar](#)). Other Activity activities are used in the Other Activity dropdown when adding other activities in the [School/Other Activities](#) case page. The table's columns are:

1. Activities: The description of the activity/appointment.
2. Activity Categories: The category of the activity.
3. Active: Whether the activity will appear in its respective dropdown.
4. Action: An action column containing an edit icon and a delete icon.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Activities, a dropdown (containing the four functional categories as well as Employment and Time Tracking) for Activity Categories, and a yes/no dropdown for Active.

Address Types

This list is used for types of physical addresses. It is used in the Address Type dropdown in the [Add New Contact](#) panel, or when adding or editing addresses in an existing [Contact Card](#). The table's columns are:

- Descriptions: The name of the address type.
- Contact Categories: Which category of contact (organization or individual) to which the address type applies. (There is no option for both; if you wish to have an address type that can be used by both contact categories, you must create the address type separately for each category.)
- Action: An action column containing an edit icon and a delete icon.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown (containing only Individual and Organization) for Contact Categories.

Adjourn/Cancel Reasons:

This list contains reasons why an appointment might be adjourned or canceled. It is used in the Reason dropdown of the Adjourn Appointment and Cancel Appointment panels, accessible by right-clicking an appointment in the [Case Summary](#), [Case Calendar](#), [Office Calendar](#), or [My SmartAdvocate](#) pages. It is a [Basic Picklist Table](#).

Appeal Types:

This list contains types of appeals. It is used in the Type dropdown in the [Appeals](#) case page. It is a [Basic Picklist Table](#).

Note: The Judgment and Order appeal types are treated slightly differently by the SmartAdvocate system than are other appeal types. It is recommended that you *do not edit or delete these two types*, to avoid confusion or irreversible (though minor) loss of functionality.

Arbitration Mediation Types:

This list contains the different types of arbitrations and mediations. It is a [Basic Picklist Table](#). It is used when creating or editing an arbitration or mediation on the ARB/Mediations case page.

Attorney Types:

This list contains types of attorneys. It is used in the Type dropdown in both the [Plaintiff Attorneys](#) and [Defendant Attorneys](#) case pages. It is a [Basic Picklist Table](#).

Benefit Types:

This list contains the types of benefits that may accrue as a result of a court or arbitration hearing. It is used in the Add/Edit Panel for Hearings on the Hearings page. It is a [Basic Picklist Table](#).

Body Types:

This list contains parts of the human body. It is used in the Body Part List when adding injury details on the [Injuries](#) case page. It is a [Basic Picklist Table](#).

Calendar Appointment Types:

This list is used to determine the default start and end time for new appointments based on the category of appointment being added. The list contains four permanent rows: one for case-related appointments at court, one for case-related appointments not at court, one for non-case related appointments, and one for personal appointments. See the [Activity Types](#) picklist for defining the appointment types that belong to each of these categories. It is possible to add new rows to this table, but it is useless; only the permanent rows have any effect. You can, however, edit the default start and end times for each appointment type. The table's columns are:

- Appointment Types: The category of appointment.
- Start Time: The default start time for new appointments of the category.
- EndTime: The default end time for new appointments of the category.
- Action: An action column containing an edit icon. If you have added any new rows, this column also contains a delete icon in those rows (but not in the permanent ones).

The add/edit form has text input fields for Appointment Types, Start Time, and EndTime. Entries in this field must be made in the 24-hour clock (otherwise known as military time). Thus, to enter 3:00 p.m. you would enter 15:00. Note: Entering anything but a time in the Start Time or EndTime fields will not be accepted by the system and will cause an error.

Campaign Group Contacts

Lists, for each campaign group (see Campaign Groups for details), the contacts that are associated with that campaign group. The table contains three columns, Campaign Group, Contacts, and Action. The rows in the Campaign Group column correspond to the items contained in the Campaign Group picklist, and can be edited, added, or deleted only from that picklist. The edit icon in the Action column for Campaign Group Contacts brings up a list of all contacts for which the contact type is Advertise, any or all of which can be added as an available contact for that Campaign Group.

Campaign Groups

Lists Campaign Groups, which are used to track advertising expenses and fees earned per advertising campaign. Campaign Groups are utilized in the Intake Statistics Dashboard.

Case Fee Structures:

This list contains fractions and percentages that may represent your firm's fee in proportion to a settlement. It is used in the Fee Structure dropdown when the retainer fee structure is set to Percentage, when adding a new retainer in the [Retainer/Referral](#) case page; it is also used in the Percentage /Fraction dropdown when adding a new referral out or a new workers' compensation attorney, also in the Retainer/Referral case page. The table's columns are:

- Fee Types: How the fee structure is expressed, either as a fraction or percentage. This column may instead contain Structure, which is intended to be used for multi-tiered fee structures, but those have not yet been implemented in SmartAdvocate, so rows with a Structure fee type currently do not do anything. They may be implemented in a future release.
- Fractions: The fraction itself, if the fee structure is expressed as a fraction. If the fee structure is expressed as a percentage, this column is ignored by the system.
- Values: The decimal representation of the fraction, if the fee structure is expressed as a fraction; or the percentage itself (without the percent sign), if the fee structure is expressed as a percentage.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a dropdown (containing Fraction, Percentage, and Structure) for Fee Types and text input fields for Fractions and Values. Note: You must enter a number (optionally including a decimal point) in the Values field. Entering anything else will not be accepted by the system and will cause an error.

Case Fee Structures (Sliding Scale):

This list allows you to create sliding scale fee arrangements, if required or permitted by your jurisdiction. The sliding scale can contain up to eight segments, based upon the amount of the recovery, with a different fee percentage for each segment.

You can add a new Sliding Scale by clicking on the Add New Item button. The add/edit form requires that you provide a name for the sliding scale, and allows you to enter up to seven segments, with the maximum recovery amount for that segment and the fee percentage for that segment. The eighth segment only permits the entry of the fee percentage, as it applies to all amounts in excess of the previous segment entered.

Case Close Reasons:

This list contains the reasons a case might be closed. It is used when closing a case, whether by directly changing the status from the [Case Summary](#) page, or by using the [Close Case](#) button in the [Quick Action Tool Bar](#). The table's columns are:

- Case Close Reasons: The description of the reason.
- Document keywords: The filter text used for selecting the document to automatically generate when using the close icon and choosing this reason. See the [Close Case](#) button for more explanation of the function of this column.
- Action: An action column containing an edit icon and a delete icon. Note: The row containing the reason DUPLICATE only has an edit icon; it cannot be deleted.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for both Case Close Reasons and Document keywords.

Case Groups:

This list contains collections of case types, called case groups. Case groups are used in many SmartAdvocate pages, most notably when managing [Case Types](#), creating a new case in the [Case Wizard](#), or searching for a case in [Case Browse](#). This list is also used for associating each case group with an incident type. This is particularly relevant when creating or managing Incident-type UDFs. See the [Incident Types](#) picklist for defining incident types, and the [UDF Editor](#) for managing UDFs. By default, every Case Status is applicable to each case group, however when creating or editing a case group, there is a checkbox labeled "Limit Statuses". If checked, you can choose the statuses that are applicable to that case group. See Case Statuses for details. The table's columns are:

- Descriptions: The name of the case group.
- Incident Types: Which incident type the case group is associated with.
- Limit Statuses: Whether all case statuses are available for the case group.
- Action: An action column containing an edit icon and a delete icon.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown for Incident Types (drawing from the [Incident Types](#) picklist).

Case Roles:

This list is used for various categories of roles. It contains the possible roles for defendants and plaintiffs in a case, the roles a staff member may take in working on a case, the roles a staff member may have in your firm, and the official titles a staff member may have in your firm. Firm roles and titles are used in the [Users](#) administrative page. Defendant and plaintiff roles are assigned when the defendant or plaintiff is added to the case, whether in the [Case Wizard](#), [Plaintiff Summary](#), or [Defendant Summary](#). They are also used in defining [Case Types](#), since only a subset of all roles are generally relevant to each case type. Staff case roles are used in several places, in particular when adding staff in the [Case Summary](#) screen. The table's columns are:

- Roles: The name of the role.
- Role Types: Which category the role is in.
- Action: An action column containing an edit icon and a delete icon, except in some of the rows for important case roles, which cannot be deleted and thus only have an edit icon.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Roles and a dropdown (containing Case Role (Staff), Defendant, Firm Role, Plaintiff, and Title) for Role Types.

Case Status Types:

This list is used for defining the types of statuses that can be applied to cases. Status types are used most notably in the Sub-Status tab of [Case Browse](#), the [Case Statuses](#) picklist, and when adding new statuses in the [Case Summary](#) screen. As of this writing, you can also edit the list of available status types in the [Status Setup](#) administrative page; this may change in a future release. It is a [Basic Picklist Table](#), with a key exception: the action column contains only an edit icon for the sub-statuses that are essential to the system, and contains no icons at all for Status, which can neither be edited nor deleted.

Case Statuses:

This list contains all the statuses in the SmartAdvocate system. Statuses in SmartAdvocate are the most important way of tracking the overall progress of your cases. They are useful both to your staff as a quick indicator of the current phase of the case, and to the SmartAdvocate system itself, which uses various statuses as triggers for certain dashboards and other automatic updates. You can add, remove, or edit a case's status in its [Case Summary](#) page, and certain actions (such as marking a case as retained using the [Retain Case](#) button) will automatically update its status for you. There are several types of statuses in SmartAdvocate: in addition to the primary case status (simply titled Status), there are sub-statuses (which can be used, for example, to add more granular detail to the current Status, or to note an aspect of the case that is less about the linear progress of the case than Statuses are) and more. As of this writing, you can also edit the list of available statuses in the [Status Setup](#) administrative page; this may change in a future release. The table's columns are:

- Descriptions: The name of the status.
- Status Short Name: The short name assigned to a status, if any.
- Status Types: The status type to which the status belongs.
- Groups: The Case Groups to which the status is applicable. If this column is blank, the status can be used with any case group.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#). Note: this column is empty for the row containing Closed Case, which is of the type Status, as this item is essential to the system and cannot be edited or deleted.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown (populated from the rows in the [Case Status Types](#) picklist) for Status Types.

Case Subtypes:

This list contains case subtypes. Case subtypes are used to provide additional fundamental information about the case type, without affecting how that type is treated by the SmartAdvocate system. For the most part, case subtypes do not interact with the SmartAdvocate system; however, they are used in defining case types in the [Case Types](#) administrative page, selected when creating a new case in the [Case Wizard](#), and available as a search filter in the Case SubType tab when using [Case Browse](#). The list is a [Basic Picklist Table](#), except that the non-action column is titled Subtypes instead of Descriptions.

Case Values:

This list contains numerical ranges that represent estimates of the value of a case. These are used when setting a case's estimated value from the [Case Summary](#) page. Each value range can also be associated with a default disbursement limit; when a case is assigned an estimated value, the disbursement limit is also applied to the case in the [Disbursements](#) case page. The table's columns are:

- Value Types: How the estimate is expressed. The content of this column is always "Range."
- From: The low end of the range.
- To: The high end of the range.
- Disbursement limits: The disbursement limit applied to the case when the value range is selected.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a dropdown for Value Types (which only contains Range) and text input fields for From, To, and Disbursement Limits. Note: Entering anything but a number in any of these text input fields will not be accepted by the system and will cause an error.

CaseBrowse Result Columns:

This list contains the available columns for the table of search results when using [Case Browse](#). It is not possible to add new rows to this table. It is possible to delete rows from this table, but it is strongly recommended that you do not delete any rows, since there is no way of undoing the change, and there is no need to delete a row. The purpose of the table is rather that it interacts with the Select Columns to Show panel in Case Browse. That panel allows you to set certain columns to appear or not appear in the results table. This list determines whether, by default, each column will be set in the panel to appear or not appear. The table's columns are:

- Column Names: The name of the column in the Case Browse results table.
- Default Select: Whether the column is set by default to appear in the Case Browse results table.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

The add/edit form has a text input field for Column Names and a yes/no dropdown for Default Select.

CaseBrowse-Activity Code Relationships:

This list is used to select the set of case types for which individual activity codes are available for time tracking. This determines which activities appear in the Activity dropdown in the [Time Tracking](#) page for a given case type. See the [Activity Codes](#) picklist for defining activity codes; they cannot be added to or deleted directly from this page, which can only be accomplished on the Activity Codes page. The table's columns are:

- Activity Codes: The description of the activity.
- Case Types: A list of case types for which the activity code is available for time tracking. If "All Case Types" appears in the list, the activity code is available for time tracking in all case types.
- Action: An action column containing an [Edit icon](#).

The edit form has a Checkbox-select dropdown containing case types for Case Type IDs, which corresponds to Case Types. To make an activity code available for all Case Types, scroll down the list to find "All Case Types", which is listed alphabetically.

Check Request Statuses:

This list contains possible statuses of a disbursement (e.g. Bill Received, Paid, etc.). It is used in the Status dropdown when adding a new disbursement in the [Disbursements](#) case page. It is a [Basic Picklist Table](#).

Check Type List:

This list contains possible purposes of a check received by your firm; i.e. what type of payment the check represents. It is used in the Type dropdown in the area for received checks when adding a new settlement in the [Negotiation/Settlement](#) case page. It is a [Basic Picklist Table](#), except that the non-action column is titled TypeName instead of Descriptions.

Client Contact Frequencies:

This list contains the criteria used to determine whether client contact is overdue in a given case, i.e., whether that case appears in the Client Contact Overdue dashboard. Note: There is also a setting in the [System Parameters](#) administrative page that affects whether a case appears in the Client Contact Overdue dashboard, but most of the settings relevant to the dashboard are found in this list. The table's columns are:

- Statuses: The case status to which the criteria apply; i.e., the rest of the row only applies to a case if that case's status matches the one in "statuses." If this column contains "Default" for some row, the criteria in that row apply to all case statuses not specifically included elsewhere in the list.
- Max Days: The number of days since the last client contact before contact is considered overdue.
- Mass Tort: If Yes, the criteria only apply to mass tort cases; if No, the criteria only apply to non-mass-tort cases.
- Note Types: A list of all note types such that a note of that type in the case is an indication of client contact.
- Document SubCategories: A list of all document sub-categories such that a document of that sub-category in the case is an indication of client contact.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a dropdown for statuses (drawing from the [Case Statuses](#) picklist for the type Status, plus the option Default), a text input field for Max Days, a yes/no dropdown for Mass Tort, a checkbox-select dropdown (drawing from the [Note Types](#) picklist) for Note Types, and a checkbox-select dropdown for Document SubCategories (drawing from the [Document Sub-Categories](#) picklist).

Client Portal Spare Time:

The Client Portal includes an area where your firm can provide general information regarding your firm, its practice areas, and more for review by your clients. This list includes descriptions for each such item available to your clients through the Portal. Upon installation and setup of SmartAdvocate and the Client Portal, this list will be empty, as it is intended to be used by your firm to describe the particular content you wish to post on the Portal. You can add a new item by clicking on the Add New Item button. The Add/Edit form provides three text entry areas, which correspond to the columns of the list. They are:

- Title: Enter the Title for the video or article you wish to share with your clients. This will be presented in bold and enlarged type on the Portal.
- Text: Enter any explanatory text or description for the video or article you wish to share.
- Video: Enter the URL of any video file you wish to share.

Once information is entered into this list, Edit and Delete icons will appear in the Action column to the far right of each row.

Collateral Types:

This list contains types of sources of compensation, generally insurance, that might pay for vehicle damage, medical bills, lost wages, or other kinds of special damages. It is used in the Collateral dropdown when adding an amount paid in the [Plaintiff Vehicles](#), [Medical Providers](#), or [Employment](#) case page, among others. It is a [Basic Picklist Table](#).

Contact Document Types:

This list contains types of documents that might be attached to a contact by means of the contact card. It is used in the Type dropdown when adding a new document in the [Notes And Documents](#) tab of a [Contact Card](#). It is a [Basic Picklist Table](#), except that the non-action column is titled Document Type Names instead of Descriptions.

Contact Number Types:

This list contains different devices and purposes with which a contact's phone number may be associated (e.g. Home, Cell, Vacation Phone, Work Fax, etc.). It is used wherever a contact can be added or edited, most notably in the [Add New Contact](#) page and the [Contact Card](#). The table's columns are:

- Contact Number Types: The type and/or location of device.
- Default: Has no purpose in the current release.
- Contact Categories: Whether the type is available to (i.e. appears in the dropdown for) individual or organizational contacts.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for a description of the Contact Number Type, a yes/no dropdown for Default, and a dropdown containing Individual and Organization for Contact Categories. A Contact Number Type can be deleted by clicking on the Delete icon in the Action column, however it must first be merged into another existing type.

Note: If you wish to create a phone number type that can be used by both organizations and individuals, you must create two separate types, one for each contact category.

Contact Relationships:

This list contains possible types of relationships between contacts in your database (such as parent/child, employer/employee, etc.). Relationships can be added in a contact's [Contact Card](#), in the Cases and Related Contacts tab. They are used in some [Merge Codes](#) and are useful for keeping track of related contacts. Additionally, the employer-employee relationship is used in various pages in SmartAdvocate, in particular when recording attorneys that work for a particular law firm or adjusters that work for an insurance company. The list is also used in the Relationship to Firm dropdown when adding an "other" referral in the [Retainer/Referral](#) case page. The table's columns are:

- Relations: The relationship type. This is a one-way relationship; see the Related To column below for automatically assigning two-way relationships.
- Is Work: Whether the relationship is work-related.
- Related To: The relationship that is the inverse of this one. For example, if Parent were in the Relations column, Child would go in the Related To column. If, in Contact A's contact card, you add a relationship with Contact B, then an inverse relationship with Contact A will automatically be added to Contact B's contact card. This allows you to note two-way relationships without having to add them separately to both parties' contact cards.
- Action: An action column containing an edit icon and a delete icon.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Relations, a yes/no dropdown for Is Work, and a dropdown containing the existing relationships in the table for Related To. Note: If you are creating two new relationship types that should be inverses of each other, create the first one and leave the Related To field blank, then create the second one and select the first one in Related To, then edit the first one and select the second one in Related To. Similarly, you can create a relationship type that is its own inverse, but you must first create it with a blank Related To, then edit it and select the same relationship type in Related To (for example, cousin or co-worker).

Contact SubCategory:

This list contains subcategories that are applied to all contacts. The list includes Adult, Deceased, Incompetent, and Infant. All of the items in the list are considered essential to the operation of SmartAdvocate and thus cannot be deleted. Their descriptions can, however, be edited. No additional subcategories can be added.

The default subcategory when entering creating a new Contact Card is Adult. If a date of death is entered in the contact card, the subcategory is automatically changed to Deceased; this subcategory cannot be altered without first removing the date of death. If a date of birth is entered in the contact card and indicates that the contact is under the age of 18, the subcategory is automatically changed to Infant; this subcategory, however, can be changed by the user.

The Prevent Mailing action is automatically applied to any contact whose subcategory is Deceased, Incompetent, or Infant, regardless of whether that status was applied by the user or automatically by SmartAdvocate; however, that can be changed by the user for any particular mailing or other type of communication.

Contact Types:

This list contains possible types of contacts. Contact types are used in various places in the SmartAdvocate system; often, a [Contact-list dropdown](#) will be limited to contacts of a particular type or set of types. The list as a whole is used in the Contact Type dropdown wherever a contact can be added or edited, most notably in the [Add New Contact](#) page and the [Contact Card](#). The table's columns are:

- Contact Types: The contact type.
- Contact Categories: Whether the type is a type of individual contact or organizational contact.
- Action: An action column containing an [Edit icon](#) in all rows, and a [Delete icon](#) in rows that are not essential to parts of the SmartAdvocate system.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Contact Types and a dropdown containing Individual and Organization for Contact Categories. Note: If you wish to create a contact type that can be used by both organizations and individuals, you must create two separate types, one for each contact category.

Court Index Types

This list contains various types of identifiers that the SmartAdvocate system groups under the collective name "dockets." It is used in the Type of Court /Docket # dropdown when adding a docket in the [Court](#) case page. It is a [Basic Picklist Table](#).

Critical Deadline Types:

This list contains various types of deadlines *other than statutes of limitation*. These deadlines are such that failure to meet them would imperil the continuation of the case. The list is used in the Type dropdown when adding a general critical deadline in the [Critical Deadlines](#) case page, and in the Category dropdown in the General Information tab when configuring a critical deadline WorkPlan item in the [Item Templates](#) administrative page. Statutes of limitation are not included in this list because they are recorded in a different part of the Critical Deadlines page and are not used in WorkPlan items; to configure types of statutes of limitation, see the [SOL Types](#) picklist. See the [Discovery Types](#) for the list used in the Type dropdown when adding a *discovery* critical deadline in the Critical Deadlines case page. The table's columns are:

- Descriptions: The description of the deadline.
- Active Types: Whether the critical deadline is currently active and thus will appear in dropdowns. Note: Marking a deadline type inactive is generally useful as an alternative to deletion, since it prevents new critical deadlines of that type from being created and avoids accidentally deleting existing instances of the deadline that have not yet been met and may still be applicable in those cases to which they have been applied.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a yes/no dropdown for Active Types.

Decision Types:

This list contains the various types of decisions that may be rendered by a court. The list is used on the Hearing page to describe the type of decision made by the court.

Delivery Methods:

This list contains the methods by which a document can be received or sent. This list is used in the Delivery method dropdown for documents (excluding emails) in the Edit Properties screen. It is a [Basic Picklist Table](#), except that the non-action column is titled Methods instead of Descriptions.

Deposition Types:

This list contains types of depositions. It is used in the Type dropdown when adding deposition information on the [Depositions](#) case page. It is a [Basic Picklist Table](#).

Disbursement Types:

This list contains types of expenses that might be incurred in the course of handling a case. It is used in the Disbursement Type dropdown when adding a disbursement in the [Disbursements](#) case page. It is a [Basic Picklist Table](#), except that the non-action column is titled Disbursements instead of Descriptions.

Discovery Types:

This list contains types of discovery (except depositions, which is covered in the Deposition Types picklist). It is used in the Type dropdown when adding discovery in the [Discovery](#) case page, and in the Type dropdown when adding a discovery critical deadline in the [Critical Deadlines](#) case page. The table's columns are:

- Descriptions: The discovery type.
- Description Types: Any additional description of the discovery type.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Descriptions and Description Types.

Document Categories:

This list contains broad categories of documents for the purposes of efficient classification and filing. For narrower categories, see the Document Sub-Categories picklist. Document Categories are used in the Document category radio selection when generating a barcode, or in the Category dropdown when attaching a document, saving a new document template in the Word plugin, or editing an existing template in the [Document Templates](#) administrative page. It is a [Basic Picklist Table](#), except that the non-action column is named Categories instead of Descriptions.

Document Folders:

This list contains the names of Document Folders that will be available in every case for every user. See Document Folders for details on creating and using Document Folders in the Documents page.

Document Sub-Categories:

This list contains particular types of documents within the broader Document Categories for the purposes of efficient classification and filing. For the broader categories themselves, see the Document Categories picklist. It is used in the Document sub-category radio selection when generating a barcode, or in the Sub-Category dropdown when attaching a document, saving a new document template in the Word plugin, or editing an existing template in the [Document Templates](#) administrative page. The table's columns are:

- Sub-Categories: The name of the subcategory.
- Categories: The name of the broader category to which the subcategory belongs.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Sub-Categories and a dropdown drawing from the [Document Categories](#) picklist for Categories.

Document Type Extensions:

This list contains file name extensions, the characters after the period in a file name that indicate what type of file it is (e.g. pdf or docx). Along with the [Document Type Groups](#) picklist, it is used to automatically fill the Document Type column in the [Documents](#) case page. The Document Type column is purely for the informational benefit of the user; it does not affect or interact with other aspects of the SmartAdvocate system. The table's columns are:

- Document Type Extensions: The file name extension.
- Document Type Group: The category of document the extension represents.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Document Type Extensions and a dropdown drawing from the [Document Type Groups](#) picklist for Document Type Group. Note: When entering an extension in the Document Type Extensions field, do not include the period in the extension, only the letters (and possibly numbers) after the period.

Document Type Groups:

This list contains categories of file types. Along with the [Document Type Extensions](#) picklist, it is used to automatically fill the Document Type column in the [Documents](#) case page. The Document Type column is purely for the informational benefit of the user; it does not affect or interact with other aspects of the SmartAdvocate system. It is a [Basic Picklist Table](#), except that the non-action column is titled DocumentType Group Names instead of Descriptions.

eLaw Appearance Types:

In the event the integration between SmartAdvocate and eLaw has been enabled (see Integrations for details), this report lists the Appearance Types provided by eLaw, and the equivalent SmartAdvocate Appointment Type to which it will be converted. The table's columns are:

- eLaw Appearance Type: The Appearance Type provided by eLaw.
- SA Appointment Type: The Appearance Type to which SmartAdvocate should convert the appearance. This is a Dropdown, pulling from the Appointment Type picklist. If no SA Appointment Type is set, SmartAdvocate will convert the eLaw Appearance Type to a standard Appointment.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

Examination Types:

This list contains possible causes or types of an adverse examination (generally, types of insurance claims that a carrier might challenge with an exam). It is used in the Exam Type dropdown when adding an adverse exam in the [Adverse Exams](#) case page. It is a [Basic Picklist Table](#).

Expert Specialties:

This list contains areas of expertise that may be the specialty of an expert involved in a case. It is used in the Expert Specialty dropdown when adding an expert in the [Expert](#) case page. The table's columns are:

- Specialties: The areas of expertise.
- Descriptions: A description of the area of expertise.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Specialties and Descriptions, and a dropdown (pulling from a hardcoded list of roles) for Contact Types.

Expert SubSpecialties

This list contains areas of expertise that may be the subspecialty of an expert involved in a case. It is a subsidiary of the expert's specialty. It is used in the Expert Specialty dropdown when adding an expert in the [Expert](#) case page. The table's columns are:

- Description: The areas of subspecialty.
- Specialty: The specialty of which the subspecialty is a subsidiary.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Description, and a dropdown (pulling from Specialties) for Specialties.

Expert Types:

This list contains types of experts (generally, the expert's profession). It is used in the Expert Type dropdown when adding an expert in the [Expert](#) case page. It is a [Basic Picklist Table](#), except that the non-action column is titled Expert Types instead of Descriptions.

Firm Information:

This picklist is not really a list. It is a table with a single row, containing the contact details of your firm. Several [Merge Codes](#) correspond to individual columns, and the Firm Name column is used whenever your firm is a possible selection in a dropdown, e.g. in the From and To dropdowns when attaching a document in the [Documents](#) case page. The table's columns are:

- Firm Name: The name of the firm.
- Phone Number: The firm's phone number.
- EMail: The firm's email address.
- Fax Number: The firm's fax number.
- Contact Person: The name of a person who acts as a representative of the firm.
- Contact Person Number: The phone number of the representative.
- Contact Person EMail: The email address of the representative.
- Application EMail: Not currently used by the SmartAdvocate system.
- Address1: The first line of the firm's street address.
- Address2: The second line of the firm's street address.
- City: The city in which the firm is located.
- County: The county in which the firm is located.
- State: The state in which the firm is located.
- Zip: The ZIP code of the city in which the firm is located.
- UniqueContactId: A number that corresponds to the firm's [Contact Card](#) in the SmartAdvocate system. The number's first digit is 2 (indicating an organization), and the remaining digits are the contact's ID (which can be found in the URL of any contact's contact card).
- Action: An action column containing an [Edit icon](#).

You cannot add a new row to the table. The edit form contains text input fields for every column except UniqueContactId, which uses a special field, a combination of text input and dropdown. If the field is empty, the dropdown offers no options. Otherwise, the dropdown contains the names of all organization contacts whose name includes the text in the field.

Grades:

This list contains schooling levels (e.g. 3rd Grade, not A or F). It is used in the Grade dropdown when adding school information on the School/Other Activities case page. It is a [Basic Picklist Table](#).

Hearing Types:

This list contains the different types of court hearings that may occur. It is used in the Add/Edit Hearing panel on the Hearing case page when entering the type of hearing. It is a [Basic Picklist Table](#).

Holidays:

This list contains holidays that your firm would need to keep track of, generally either because they are court holidays or because your firm itself observes them. (You are free to add a holiday to this picklist - for example, Arbor Day - but doing so is unlikely to be helpful unless your firm happens to celebrate that holiday.) When you attempt to create an appointment that would take place on a holiday you will receive a warning, giving you the opportunity to reschedule or confirm the appointment time as you see fit. The table's columns are:

- **Date:** The date and time at which the holiday begins. All holidays in the SmartAdvocate system are considered to consist of the twenty-four-hour period beginning at the holiday's start time. Most holidays should therefore be set to 12:00:00 AM on their respective days. However, for holidays that do not align with Gregorian calendar days, such as Jewish holidays, you may prefer to set a specific time of day for the holiday to begin.
- **Holiday:** The name of the holiday.
- **IsFederal:** Whether the holiday is a federal holiday.
- **IsState:** Whether the holiday is a state holiday in at least one state (or, if you prefer, in the state in which your firm or office is located).
- **States:** A list of all states in which the holiday is a state holiday.
- **IsOfficeObserved:** Whether the holiday is observed by your firm.
- **Action:** An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Date and Holiday, yes/no dropdowns for IsFederal and IsState, a checkbox-select dropdown containing states and Canadian provinces for States, and another yes/no dropdown for IsOfficeObserved. Note: The Date field requires that both a date and a time be entered, in either order, and nothing else. Entering only a date will default the time to 12:00:00 AM. Entering only a time will default the date to the current date. Entering anything else will not be accepted by the system and will cause an error.

Incident Types:

This list contains broad categories of incidents that would be the subject of a case. Incident types are the top level of the case type hierarchy: incident types are collections of case groups, which are collections of case types, which each have a set of available case subtypes. See the [Case Groups](#) picklist for associating case groups with incident types. Incident types are also used when managing Incident Type UDFs in the [UDF Editor](#) administrative page. The table's columns are:

- **Description:** The name of the incident type. This is what appears in the dropdowns that select among incident types.
- **Short Name:** A version of the incident type suitable for automatic insertion in generated documents. This is what is used to fill in the INC-TYPE merge code.
- **Action:** An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Description and Short Name.

Injuries:

This list contains health issues that may be suffered by specific body parts. It is used in the Injury List when adding injury details on the [Injuries](#) case page. The table's columns are:

- **Descriptions:** A description of the injury.
- **Body Parts:** A body part that may suffer the injury.
- **Action:** An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown (pulling from the [Body Types](#) picklist) for Body Parts. Note that if you wish to add an injury that may be suffered in multiple parts of the body, you will need to add multiple rows with the same description, one for each body part.

Insurance Types:

This list contains types of insurance. It is used in the Insurance Type dropdown when adding an insurance company in either the [Plaintiff Insurance](#) or [Defendant Insurance](#) case page. It is a [Basic Picklist Table](#).

Investigation Types:

This list contains types of investigative actions (including searches, reviews, and acquisition of non-medical records). It is used in the Investigation Type dropdown when adding an investigation in the [Investigations](#) case page. It is a [Basic Picklist Table](#).

Liability Codes:

This list contains each defendant's proportion of liability for the incident that gave rise to plaintiff's injury. It is used on the Accident page within an open case, within the Incident Details panel. Liability Codes can only be accessed, entered, or edited from within the open case; it is not available when entering Incident Details when creating a case from Case Wizard. The table's columns are:

- **Code:** A unique code assigned to each Liability Code.
- **Description:** The fraction or percentage of liability for the incident assigned to the defendant(s).
- **Action:** An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Code and Description.

Lien Types:

This list contains possible sources of liens (mostly, but not exclusively, types of insurance). It is used in the Lienor Type dropdown when adding a new lienor, and in the Lien Type dropdown when adding a new lien, both in the [Lien Tracking](#) case page. It is a [Basic Picklist Table](#).

Mailing Lists:

This list contains mailing lists, which are collections of contacts that can be used for efficient mass generation of documents in the [Contacts List](#) page. This picklist is used when managing a contact's mailing list assignments in the Mailing Lists tab of the [Contact Card](#), when searching for contacts that

belong to a particular mailing list in the [Contact Search Criteria](#) panel, or when adding or removing contacts from mailing lists in the Mass Action menu of the [Contact Search Results](#). Managing which contacts belong to each mailing list is handled on those other pages; this one is only used for defining the lists themselves. The table's columns are:

- Names: The name of the mailing list.
- Descriptions: A description of the purpose of the mailing list.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Names and Descriptions.

Medical Provider Specialties:

This list is for general fields of medical specialization. For more fine-grained specialization, see the [Medical Provider SubSpecialties](#) picklist. It is used in the Specialty dropdown of the Contact Type Details area when creating or editing a contact with a medical type (such as Doctor or Hospital) in either the [Add New Contact](#) panel or the [Contact Card](#). It is a [Basic Picklist Table](#).

Medical Provider SubSpecialties:

This list is for particular medical specializations within more general medical fields. For the more general medical fields themselves, see the [Medical Provider Specialties](#) picklist. It is used in the Sub Specialty dropdown of the Contact Type Details area when creating or editing a contact with a medical type (such as Doctor or Hospital) in either the [Add New Contact](#) panel or the [Contact Card](#). The table's columns are:

- Descriptions: The name of the sub-specialty.
- Specialties: The more general specialty to which the sub-specialty belongs.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown drawing from the [Medical Provider Specialties](#) picklist for Specialties.

Medical Visit Results:

This list is for types of results that could arise as a result of a visit to a medical professional. For more details about the different types of medical visits, see the Medical Visit Types picklist. It is used in the Medical Providers page when adding a visit. It is a dropdown, which is populated based on the Visit Type chosen. The table's columns are:

- Visit Results: The result of the visit.
- Visit Type: A dropdown listing the Visit Types to which the result will attach.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Visit Results and a dropdown drawing from the Visit Type picklist.

Medical Visit Types:

This list contains types of distinct medical visit events. It is used in the Visit Type dropdown when adding a visit to the [Medical Visits Table](#) on the [Medical Providers](#) page. It is a [Basic Picklist Table](#), except that the non-action column is titled Medical Visit Types instead of Descriptions.

Merge Codes:

This list contains all the merge codes in the SmartAdvocate system. See [Merge Codes](#) for an explanation of how to use merge codes. The table's columns are:

- Merge Codes: The text of the code.
- Merge Code Types: The category of information the merge code corresponds to. This column is used in the Type dropdown in the Insert Merge Code panel in the Word plugin.
- Descriptions: The information the merge code corresponds to.
- Action: An action column containing an [Edit icon](#).

You cannot add a row to the table. The edit panel only allows you to edit the Descriptions field, which is a text input field.

Method of Service:

This list contains methods of serving legal papers. It is used in Method of Service dropdowns or checkbox-select dropdowns almost anywhere service is recorded, including nearly every page in the Litigation case page category. It is a [Basic Picklist Table](#).

Motion Types:

This list contains types of motions. It is used in the Type dropdown when adding a motion in the [Motions](#) case page. It is a [Basic Picklist Table](#).

Note Types:

This list contains subject areas of notes in the SmartAdvocate system. It is used in the Type dropdown when you [Add a Note](#), and in the Note Type dropdown when adding a Quick Note in the [Quick Notes](#) administrative page. The table's columns are:

- Note Types: The name of the note type.
- Descriptions: A description of the note type.
- Short Name: An optional short name for the note type.
- Action: An action column containing an [Edit icon](#) in all rows, and a [Delete icon](#) in rows that are not essential to parts of the SmartAdvocate system.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Note Types, Descriptions and Short Name.

Offices:

This list contains all the offices that comprise your firm. It is used in the Office dropdown when editing case details from the [Case Summary](#) page. The table's columns are:

- Office Statuses: The importance rank of the office, with 1 indicating a primary office.
- Office Names: A distinguishing name for the office. This is the column that appears in the Office dropdown.
- States: The state in which the office is located.
- Default Offices: If True, all new cases created in the [Case Wizard](#) are automatically assigned to this office. The office to which a case is assigned can be revised after the case is created on the Case Summary page by clicking the Edit Case icon.
- Letterheads: The file name of the letterhead associated with the office. When documents containing the Letterhead merge code are generated for cases handled in the office, this column determines the file used for the merge.
- UniqueContactId: A number that corresponds to the firm's [Contact Card](#) in the SmartAdvocate system. The number's first digit is 2 (indicating an organization), and the remaining digits are the contact's ID (which can be found in the URL of any contact's contact card).
- From Number for SMS: The reply-to phone number when sending texts in SA from cases handled in the office. This is the number text recipients will see as the text having come from. Has no effect if texting is not enabled.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form contains text input fields for Office Statuses, Office Names, Letterheads, and From Number for SMS; a dropdown populated from the [States](#) picklists for States; and a true/false dropdown for Default Offices. UniqueContactId uses a special field, a combination of text input and dropdown. If the field is empty, the dropdown offers no options. Otherwise, the dropdown contains the names of all organization contacts whose name includes the text in the field. Note: it is not recommended to edit the Letterheads field directly. Adding and modifying the letterhead should be performed in Word using the Word plug-in. Creating multiple offices can be an effective way to manage different letterheads a firm may use at the same location (for example, different departments at the same firm).

Prefixes:

This list contains honorific prefixes: terms or abbreviations that precede a contact's name. It is used in the Prefix dropdown wherever a contact can be added or edited, most notably in the [Add New Contact](#) panel and the [Contact Card](#). The table's columns are:

- Descriptions: The text of the prefix.
- Gender: Whether the prefix is specific to females or males or is not specific to either.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown containing Female, General, and Male for Gender.

Product:

This list contains products that may be the subjects of cases (likely, mass tort actions). It is used in any UDFs of the type Product or Medical Device (depending on the contents of the Medical Device column in the table). For more information about UDFs, see the [UDF Editor](#) administrative page. The table's columns are:

- Description: The name of the product.
- Medical Device: Whether the product is a medical device. If the column contains Yes, the product appears in dropdowns of the UDF type Medical Device. If the column contains No, or is blank, the product appears in dropdowns of the UDF type Product.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Description and a yes/no dropdown for Medical Device.

Provider Types:

This list contains categories of service providers. It is used in the Provider Type dropdown when adding another provider in the [Other Providers](#) case page. It is a [Basic Picklist Table](#).

Quick Note Groups:

This list contains groups within which Quick Notes can be assigned in order to simplify the selection of a specific Quick Note. Each Quick Note can, but does not have to, be assigned to a Quick Note Group. It is used as a filter when choosing a particular Quick Note from the Quick Note button on the Quick Action toolbar within a case. The list is a [Basic Picklist Table](#), except that the non-action column is titled Quick Note Group instead of Descriptions.

Quick Notes:

The Quick Note system in SmartAdvocate allows you to efficiently create simple, frequently used notes in your cases. See [Add a Quick Note](#) for details on using Quick Notes. The Quick Notes picklist page is where you can create and manage Quick Notes. The page contains a table listing all of the Quick Notes in the SmartAdvocate system. The table's columns are:

- Quick Note: The text contained in the Quick Note.
- Note Group (Category): The Note Group to which the Quick Note has been assigned. When adding a Quick Note, if a Group or Category is chosen, only those Quick Notes assigned to that Group or Category will be displayed.
- Note Type: The Note Type for which the Quick Note is available. See Note Types for additional details.
- Priority: The priority assigned to the Quick Note. A dropdown containing Critical, High, Low, and Normal.
- Note Subject: An optional field to describe the subject of the note.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Quick Note, a dropdown for Note Groups (populated from the Note Groups picklist), a dropdown for Note Type (populated from the Note Type picklist), a dropdown for Priority, and a text input field for Note Subject.

| Quick Note | Note Group | Note Type | Priority | Note Subject | Action |
|---|---|---|----------|--------------|-----------------|
| Called education and left a message on voice mail | Other | Adjunct | Normal | | [Edit] [Delete] |
| Called Client - left message & text email | email | Message - Left Electronic Message for Plaintiff | Normal | | [Edit] [Delete] |
| Called Client - left message on machine | email | Message - Left Electronic Message for Plaintiff | Normal | | [Edit] [Delete] |
| Called Client - left message regarding signed bill | Message - Left Electronic Message for Plaintiff | Message - Left Electronic Message for Plaintiff | Normal | | [Edit] [Delete] |
| Called Client - left message with a person who answered the phone | Message - Left Electronic Message for Plaintiff | Message - Left Electronic Message for Plaintiff | Normal | | [Edit] [Delete] |
| Called Client - no answer - No message | Message - No Answer (No message) | Message - No Answer (No message) | Normal | | [Edit] [Delete] |
| Called Client - updated phone or Case Status | Message - Contacted | Message - Contacted | Normal | | [Edit] [Delete] |
| Called Client - updated contact information | Message - Contacted | Message - Contacted | Normal | | [Edit] [Delete] |
| Case signed for investigator | Report | Report | Normal | | [Edit] [Delete] |
| Client Moved Bill Back | Message - Contacted | Message - Contacted | Normal | | [Edit] [Delete] |
| Closed and sent letter - No target info | Message | Message | Normal | | [Edit] [Delete] |
| Closed and sent no contact - Report | Other | Other | Normal | | [Edit] [Delete] |
| Created adjuster | Other | Other | Normal | | [Edit] [Delete] |
| Created adjuster | Other | Other | Normal | | [Edit] [Delete] |
| Reviews Meds checked and needs to submit | email | Task Prep | High | | [Edit] [Delete] |
| Item contact email to Client | Other | Other | Normal | | [Edit] [Delete] |
| Item follow up email to out firm | Out Firm Update | Out Firm Update | Normal | | [Edit] [Delete] |
| mail | Substantive | Substantive | Group | | [Edit] [Delete] |

Races:

This list contains the races that constitute the traditional divisions of humankind. It is a [Basic Picklist Table](#).

Religions:

This list contains the religions in which much of the human race consider themselves members. It is a [Basic Picklist Table](#).

Report Types:

This list contains types of investigative reports. It is used in the Report Type dropdown when either adding a report for a particular expert in the [Expert](#) case page, or adding a police report in the [Investigations](#) case page. The table's columns are:

- Descriptions: The type of report.
- Report Types: The function of this column may be changed in a future version of SmartAdvocate, but as of this writing, unless this column contains "Expert Reports," the report type is not accessible from any page or dropdown. If the column does contain "Expert Reports," the type will appear in both the dropdown for expert report types and for police report types.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown (containing Expert Reports, Report Type1, and Report Type2) for Report Types.

Request Status:

This list contains possible statuses of medical record requests. It is used in the Status dropdown when adding a medical request in the [Medical Providers](#) case page. The table's columns are:

- Statuses: The name of the status.
- Descriptions: A description of the status's meaning.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#) in rows that are not essential to parts of the SmartAdvocate system.

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for Statuses and Descriptions.

Seeking Types:

This list contains the different types of relief that may be sought through a court hearing. It is used in the case Hearing page. It is a [Basic Picklist Table](#).

Sequelae:

This list contains conditions that may follow from injuries to a particular body part. It is used in the Sequelae List when adding injury details on the [Injuries](#) case page. The table's columns are:

- Descriptions: A description of the sequela.
- Body Parts: A body part that may suffer the sequela.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown (pulling from the [Body Types](#) picklist) for Body Parts. Note that if you wish to add a sequela that may be suffered in multiple parts of the body, you will need to add multiple rows with the same description, one for each body part.

Settlement Types:

This list contains the types of settlements that can terminate a case. It is used in the Add Settlement panel on the Negotiation/Settlement Page within a case. Note that the term "Settlement" applies to any action that resolves a case, whether by negotiation, judgment, or otherwise. It is a [Basic Picklist Table](#), except that the non-action column is titled Types instead of Descriptions.

SOL Types:

This list contains categories of deadlines, mostly statutes of limitation, that expire a set period of time after some incident date, depending on the type of incident and sometimes the status of the injured party (i.e.: deceased, infant, etc.). It is used in the SOL Type dropdown when performing a mass add in the [Edit Statute of Limitations Panel](#) in the [Case Types](#) administrative page. It is a [Basic Picklist Table](#), with a key exception: the action column contains only an edit icon for the SOL types that are essential to the system.

Special Damage Subtypes:

This list contains particular forms of quantifiable financial loss or expense within more general categories. For the more general categories themselves, see the [Special Damage Types](#) picklist. It is used in the Sub-Type dropdown when adding a special damage in the [Special Damages](#) case page. Note: most special damages are automatically entered when bills or other losses are entered in other case pages. These special damages are automatically assigned types and subtypes; those types and subtypes are part of the SmartAdvocate system and not related to this picklist. The picklist is only for special damages that are entered manually. The table's columns are:

- Descriptions: The description of the subtype.
- Special Damage Types: The more general category to which the subtype belongs.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and a dropdown drawing from the [Special Damage Types](#) picklist for Special Damage Types.

Special Damage Types:

This list contains general categories of quantifiable financial loss or expense. For more fine-grained classification, see the [Special Damage Subtypes](#) picklist. It is used in the Type dropdown when adding a special damage in the [Special Damages](#) case page. Note: most special damages are automatically entered when bills or other losses are entered in other case pages. These special damages are automatically assigned types and subtypes; those types and subtypes are part of the SmartAdvocate system and not related to this picklist. The picklist is only for special damages that are entered manually. It is a [Basic Picklist Table](#), except that the non-action column is named Damage Type Descriptions instead of just Descriptions.

Stage Intervals:

This list contains time ranges, each of which is associated with a particular case stage. It is used in the Stage Dashboards to separate cases into tiers based on the length of time spent in the current stage. The table's columns are:

- Stages: The stage the time range is associated with; i.e., which dashboard uses the range.
- From: The number of days at the low end of the range.
- To: The number of days at the high end of the range.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a dropdown containing all stages for Stages, and text input fields for From and To. See the [Stages Setup](#) administrative page for editing the list in the Stages dropdown.

Notes for creating useful ranges: Remember to start your lowest range for each stage with a From of 0. The From of any other range should be one higher than the To of the range just below it (to avoid having cases at the border of the two ranges appear in both). SmartAdvocate uses the number 60000 in the interval picklists to indicate an effectively infinite number. If the number 60000 is in the To column for some row, and, for example, 100 is in the From column, then in the corresponding stage dashboard, there will be a tier labeled "over 99 Days" (i.e. 100 days and up).

States:

This list contains states, provinces, commonwealths, territories, and other sub-national entities that have their own legal codes. It is used anywhere you would select a state or similar entity, such as contact addresses, most notably when configuring SOLs in the [Case Types](#) administrative page and when selecting the incident state in the [Case Wizard](#) for a new case.

| Add New Item | | Picklist Maintenance | | | | Export |
|-----------------|------------|--------------------------|------------------------------------|------------------------------------|--------|--------|
| State | State Code | Country | Max Days to Serve S&C after Filing | Max Days to Filing S&C after Serve | Action | |
| --Unknown State | -U | UNITED STATES OF AMERICA | | | | |
| Alabama | AL | UNITED STATES OF AMERICA | | | | |
| Alaska | AK | UNITED STATES OF AMERICA | | | | |
| Alberta | AB | CANADA | | | | |
| American Samoa | AS | UNITED STATES OF AMERICA | | | | |
| Arizona | AZ | UNITED STATES OF AMERICA | | | | |

The table's columns are:

- State: The name of the state, province, or other state-like entity.
- State Code: The postal abbreviation for the entity.
- Country: The country in which the entity is located.
- Max Days to Serve S&C after Filing: The maximum number of days after the filing of a Summons and Complaint within which service must be effectuated, if so required by the particular state. This setting will override the default setting entered in the Max Days to Serve Summons and Complaint after Filing parameter set in System Parameters.
- Max Days to Filing S&C after Service: The maximum number of days after service of a Summons and Complaint within which the Summons and Complaint must be filed with the court, if so required by the particular state. This setting will override the default setting entered in the Max Days to Serve Summons and Complaint after Filing parameter set in System Parameters.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has text input fields for State, State Code, Max Days to Serve S&C after Filing, and Max Days to Filing S&C after Serve, and a dropdown containing a hardcoded list of countries for Countries.

Status Intervals:

This list contains time ranges, each of which is associated with a particular primary case status. It is used in the Stage Dashboards to separate cases into tiers based on the length of time spent in the current status. It is also used in the Cases With Long Time In Status report and the Cases With Overdue Status panel on the [My SmartAdvocate](#) page to determine when a case has spent too long in the same status. The table's columns are:

- Statuses: The status the time range is associated with.
- From: The number of days at the low end of the range.

- To: The number of days at the high end of the range.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a dropdown containing all primary statuses for Statuses, and text input fields for From and To. See the [Case Statuses](#) picklist for editing the list in the Statuses dropdown.

Notes for creating useful ranges: Remember to start your lowest range for each status with a From of 0. The From of any other range should be one higher than the To of the range just below it (to avoid having cases at the border of the two ranges appear in both). SmartAdvocate uses the number 60000 in the interval picklists to indicate an effectively infinite number. Rows with 60000 in the To column also determine when a case is considered to have spent too long in a status. If the number 60000 is in the To column for some row, and, for example, 100 is in the From column, then in the corresponding stage dashboard, there will be a tier labeled "over 99 Days" (i.e. 100 days and up), and any cases that are in that tier will also appear in the Cases With Long Time In Status report and the Cases With Overdue Status panel on the [My SmartAdvocate](#) page.

Storage Location:

This list contains descriptions of places where case evidence might be stored. It is used in the Storage Location dropdown when adding evidence in the [Evidence](#) case page. It is a [Basic Picklist Table](#).

Suffixes:

This list contains honorific suffixes: terms or abbreviations that follow a contact's name. It is used in the Suffix dropdown wherever a contact can be added or edited, most notably in the [Add New Contact](#) page and the [Contact Card](#). It is a [Basic Picklist Table](#).

Task Categories:

This list contains types of tasks. It is used in the Category dropdown when [Assigning a Task](#) or adding a template in the [Task Templates](#) administrative page. It is a [Basic Picklist Table](#), except that the non-action column is named Task Categories instead of Descriptions.

Time Tracking Statuses:

This list contains statuses for use when entering your time for tracking purposes. It is used when adding your time in the Time Tracking page from within a case. See [Add Time Tracking](#) for details of adding your time. It is a [Basic Picklist Table](#), except that the non-action column is named Status Names instead of Descriptions.

Treatments:

This list contains medical actions that may be employed in the treatment of particular injuries. It is used in the Treatments List when adding injury details on the [Injuries](#) case page. The table's columns are:

- Descriptions: A description of the treatment.
- Body Parts: A body part that may suffer the injury being treated.
- Injuries: The injury being treated.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Descriptions and dropdowns for Body Parts (pulling from the [Body Types](#) picklist) and Injuries (pulling from the rows in the [Injuries](#) picklist with the selected body part in the Body Parts column). Note that if you wish to add a treatment that may be applied to multiple parts of the body or to multiple injuries, you will need to add multiple rows with the same description, one for each body part/injury combination.

Vehicle Body Types:

This list contains classes of vehicle (e.g. sedan, SUV, motorcycle, etc.). It is used in the Body Type dropdown when adding a new vehicle in either the [Plaintiff Vehicles](#) or [Defendant Vehicles](#) case page. It is a [Basic Picklist Table](#).

Vehicle Makes:

This list contains brands of vehicles. It is used in the Make dropdown when adding a new vehicle in either the [Plaintiff Vehicles](#) or [Defendant Vehicles](#) case page. It is a [Basic Picklist Table](#), except that the non-action column is named Makes instead of Descriptions.

Vehicle Models:

This list contains models of vehicles from each manufacturer listed in the Vehicle Makes picklist. It is used in the Model dropdown when adding a new vehicle in either the [Plaintiff Vehicles](#) or [Defendant Vehicles](#) case page. The table's columns are:

- Models: The name of the vehicle model.
- Makes: The name of the vehicle manufacturer.
- Action: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can add a new row to the table by clicking the Add New Item button. The add/edit form has a text input field for Models and a dropdown drawing from the [Vehicle Makes](#) picklist for Makes.

Vehicle Plate Types:

This list contains classes of vehicle license plate. It is used in the Plate Type dropdown when adding a new vehicle in either the [Plaintiff Vehicles](#) or [Defendant Vehicles](#) case page. It is a [Basic Picklist Table](#).

Case Types

The Case Types administrative page allows you to create and manage the case types in the SmartAdvocate system. Since the case type determines many important characteristics of a case (including SOLs, possible case roles for defendant(s) and plaintiff(s), intake targets, and other information) this is one of the *most important administrative pages*. For that reason, it is directly accessed from the Admin tab, rather than through Picklist Maintenance.

To add a new row, click the New Case Type button in the upper left corner, which opens the [The Edit Case Type Panel](#) with all the information blank or set to defaults.

Structure of this Page

A. New Case Type: This button is used to create a new Case Type.

B. Case Type Administration Table: This table contains some of the details of all the Case Types contained in the system.

Case Type Administration Table

The Case Type Administration Table displays some descriptive details of your Case Types. However, some of the information associated with that case type and managed through the Case Types page is not shown in the table. To view the additional information, it may be necessary to open the [The Edit Case Type Panel](#) or the [Edit Statute of Limitations Panel](#).

Columns in the Table

The Case Type Administration Table contains the following columns:

A. [Column with Checkbox Heading]: Checkbox selector.

B. Case Type: The name of the Case Type.

C. Case Group: The case group that the case type is assigned to.

D. Case Subtype: A list of all the possible subtype assigned to the case type.

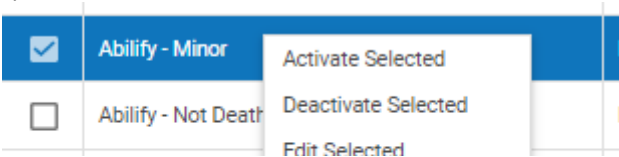
E. Is Mass Tort: Whether the case type represents a mass tort case.

F. Active: Whether the case type is active in the SmartAdvocate System. Inactive types cannot be chosen when creating new cases in the Case Wizard. Cases with a case type that is subsequently made inactive are not impacted by the change in the availability of the case type.

G. Actions: Includes an [Edit icon](#), [Delete icon](#), [SQL icon](#), and [Copy icon](#).

Mass Editing

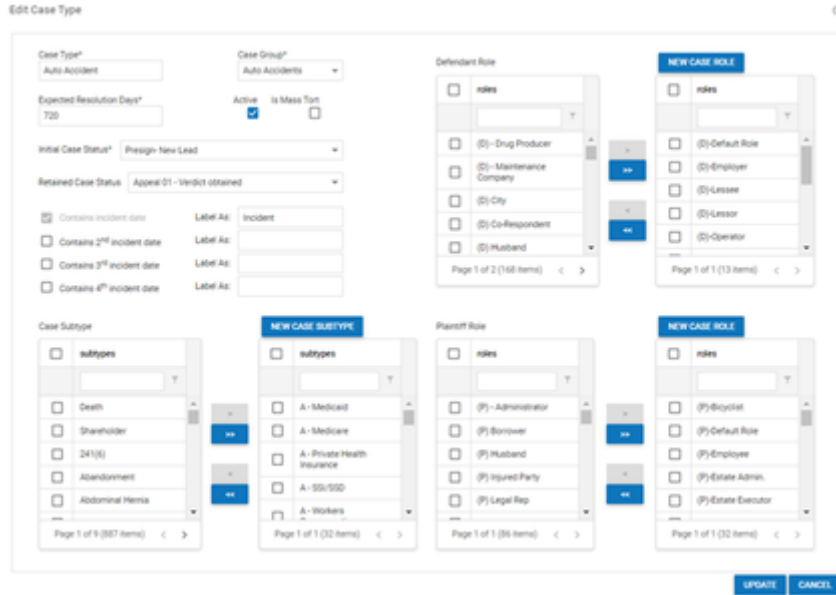
The column of checkboxes allows you to select multiple row for the purpose of editing them simultaneously. You can also click the checkbox in the heading to select all of the rows in the current filter. Once you have selected whatever rows you wish you can right-click to bring up a menu with four options:





- Activate Selected: Sets the Active column in all selected rows to Yes, regardless of its previous setting.
- Deactivate Selected: Sets the Active column in all selected rows to No, regardless of its previous setting.
- Edit Selected: Opens the [Edit Case Type Panel](#), allowing for [Editing Multiple Case Types](#).
- Edit SQL for Selected: Opens the [Edit Statute of Limitations Panel](#), allowing for [Edit Multiple Case Types](#).

The Edit Case Type Panel



This panel allows you to edit most characteristics of a case type. The upper left quadrant of the panel contains most of the input fields to be filled in. From here, you can edit the name of the case type, the case group it is assigned to, the expected resolution time for that case type, choose whether the case type is active and whether it is a mass tort and the default case status that cases of this type will be assigned when they are opened.

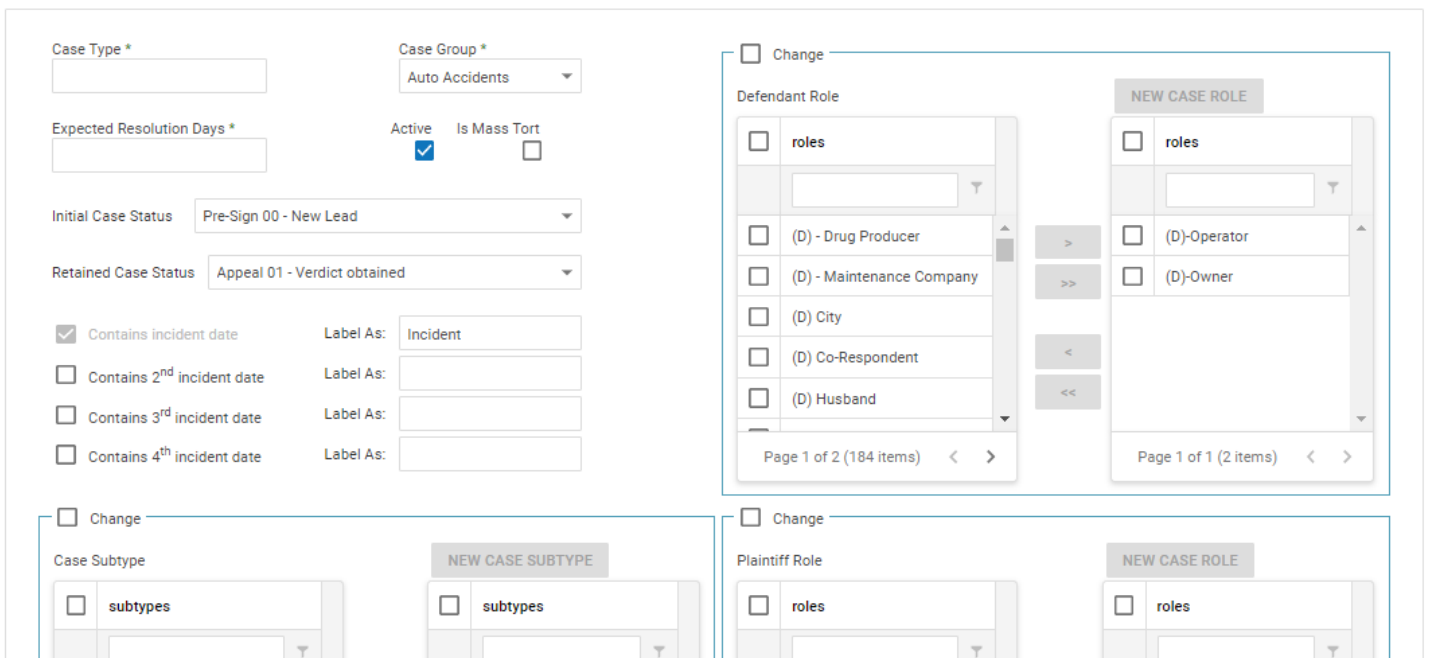
In this quadrant, you are also able to set up to four significant incident dates which trigger statutes of limitation. Select the checkbox for each incident date you wish to include in the case type (the first one is permanently selected), then fill out the label to name the incident date.

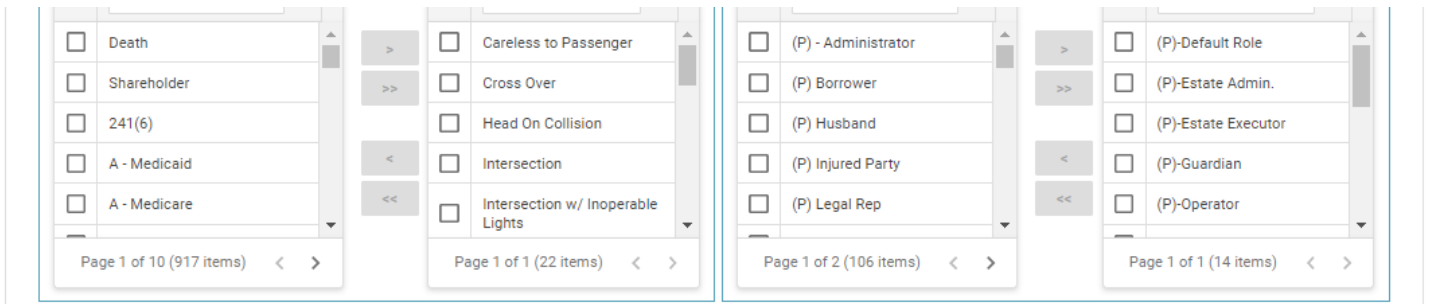
The other three quadrants of the panel allow you to add possible subtypes, roles for defendants and roles for plaintiffs to the case type. Each of the three quadrants is a checkbox list pair. You can also add a new subtype, defendant role, or plaintiff role to the list of choices by clicking the New Case Subtype or New Case Role button above the appropriate list in that quadrant, then filling in the name of the subtype or role and clicking the Add button.

To save any changes made to the case type, click the Update button in the lower right of the screen this will create a new case type if you selected New Case Type or will apply the changes to any existing case type(s) you were editing. To discard any changes and close the panel you can click the Cancel button or the white X in the top right of the screen.

Editing Multiple Case Types

Edit Case Type





If you reached this panel by choosing Edit Selected in the right-click menu after having selected multiple case types via the checkboxes in the left column of the Case Type Administration Table, this panel will be slightly different.

Each of the field in the upper left quadrant will be blank unless that field is consistent among all the selected case types. In particular, Case Type will be blank, and will not be editable. Anything that is entered into any field in this panel will, once saved, apply those changes to *every case type selected*. Do not make changes using this method that you do not want to apply identically to all of your selections. Fields left blank will not change the information in those fields in any of the case types selected.

The three checkbox list pair quadrants will have a thin box around them with a checkbox at the top labeled Change. Unless the Change checkbox for a quadrant is selected, that quadrant's information will not be affected by any edits made in this panel, nor by saving the panel. The subtypes and roles listed as belonging to the case type will be only those belonging to *every case type selected*. Subtypes and roles belonging to some of the selected case types but not others will be in the left list though they did not belong to the case types at all; if the Change checkbox is selected and the panel is saved, these subtypes or roles will be removed from the case types of which they were members if they are not added to the case type from this page.

The Edit Statute of Limitations Panel

Edit Statute of Limitation

Case Type - Auto Accident

MASS ADD Export

| <input type="checkbox"/> | SOL Type | Year | Month | Day | Subtract on | Role | Role Ty | State | Incident | Actions |
|--------------------------|----------|------|-------|-----|-------------|------------|---------|------------|----------|---------|
| <input type="checkbox"/> | No Fault | 0 | 0 | 30 | No | (P)-Spouse | P | California | Incident | |
| <input type="checkbox"/> | No Fault | 0 | 0 | 30 | No | (P)-Spouse | P | Colorado | Incident | |
| <input type="checkbox"/> | No Fault | 0 | 0 | 30 | No | (P)-Spouse | P | Maryland | Incident | |
| <input type="checkbox"/> | No Fault | 0 | 0 | 30 | No | (P)-Spouse | P | Oregon | Incident | |
| <input type="checkbox"/> | No Fault | 0 | 0 | 30 | No | (P)-Spouse | P | New York | Incident | |
| <input type="checkbox"/> | No Fault | 0 | 0 | 30 | No | (P)-Spouse | P | New Jersey | Incident | |

Page 1 of 19 (1853 items) 1 2 3 4 ... 19 >

ADD DEFAULT DEFENDANT Export

| Defendant Name | Address | Role | Actions |
|----------------|--|--------------|---------|
| Doe, John | 123 Main Street, Anytown, AL, UNITED STATES OF AMERICA | (D)-Operator | |

Page 1 of 1 (2 items) 1 >

ADD DEFAULT STAFF Export

| Staff Name | Role | Actions |
|----------------|------|---------|
| (Case Creator) | | |

Page 1 of 1 (1 items) 1 >

CLOSE

This panel allows you to edit the statutes of limitations relevant to the case type, add a default defendant to newly opened cases of that type, and add default staff members to newly opened cases of that type. The panel contains three tables: one for SOLs, one for default defendants, and one for default staff members.

Adding SOLs to the table is a little different than adding rows to most tables in SmartAdvocate. Since you will need to enter separate SOLs for every state and every role you might encounter in handling cases of the selected case type, you may find that even though the type and length of an SOL is the same across states and roles, it still needs a large number of rows in the table to cover every combination of states and roles. Therefore, instead of adding rows one by one, the SOL table's Add button is labeled Mass Add. For more on the details of this panel see [Mass Add SOL Panel](#).

Adding or editing a default defendant only requires selecting a contact for the name and choosing a default role, but the default defendant table will also include the address of the defendant contact. You may want to add a "John Doe" or "City of Anywhere" contact, with only the minimum required information, for this purpose.

Similarly, adding or editing a default staff member only requires selecting the staff member's name, but the table will also include that staff member's default case role. "(Case Creator)" will also be one of the options for a default staff member; this will automatically add the staff member who created the case in [Case Wizard](#) into the case, as that staff member's default role.

Mass Add SOL Panel

The fields in the Mass Add panel are:

The screenshot shows the 'Edit SOL' panel with the following fields labeled A through H:

- A:** SOL Type dropdown menu.
- B:** Role selection with radio buttons for 'All Plaintiff Roles', 'All Defendant Roles', and a 'Specify' dropdown.
- C:** State multiselect dropdown.
- D:** Year text input field.
- E:** Month text input field.
- F:** Day text input field.
- G:** 'Subtract one day' checkbox.
- H:** 'Calculate From' dropdown menu with 'Incident' selected.

A. SOL Type: A dropdown allowing you to select the type of SOL to be added to the case type. This dropdown is customizable from the [SOL Types](#) Picklist Maintenance page.

B. Role: Allows you to choose whether the SOL will be applied to the Plaintiff regardless of role, the Defendant regardless of role or a specific case role.

Selecting Specify will require you to select one or more case roles from the dropdown, which the SOL will then be applied to. Both defendant and plaintiff roles are listed in this dropdown.

C. State: A multiselect dropdown prompting you to select which states the SOL is applicable for.

D. Year: A text field allowing you to enter the number of years the SOL is from the calculation date.

E. Month: A text field allowing you to enter the number of months the SOL is from the calculation date.

F. Day: A text field allowing you to enter the number of days the SOL is from the calculation date.

G. Subtract One Day: A checkbox that, when checked, sets the due date of the SOL as one day before the actual SOL date.

H. Calculate From: A dropdown allowing you to choose what date to calculate the SOL from. The options in this dropdown are any of the assigned **Incident Dates**, **Date of Birth**, and **Date of Death**.

Editing Statute of Limitations Panel for Multiple Case Types

| Edit Statute of Limitation | | | | | | | | | | | |
|--|--------------|------|-------|-----|-------------|--------------|---------|----------------|----------|---------|--|
| Case Type - Auto MUN Med Mal,Auto Muni NYC,Auto Municipal,Auto vs. US Govt,Auto vs. US Govt & Non Govt | | | | | | | | | | | |
| MASS ADD | | | | | | | | | | | |
| <input type="checkbox"/> | SOL Type | Year | Month | Day | Subtract on | Role | Role Ty | State | Incident | Actions | |
| <input type="checkbox"/> | SOL | 1 | 0 | 0 | No | (D)-Owner | D | -Unknown State | Incident | | |
| <input type="checkbox"/> | Control Date | 1 | 0 | 0 | No | (D)-Owner | D | -Unknown State | Incident | | |
| <input type="checkbox"/> | SOL | 1 | 0 | 0 | No | (D)-Operator | D | -Unknown State | Incident | | |
| <input type="checkbox"/> | Control Date | 1 | 0 | 0 | No | (D)-Operator | D | -Unknown State | Incident | | |

Page 1 of 1 (4 items) < 1 >

ADD DEFAULT DEFENDANT Export [Print] [Refresh] [Filter]

| Defendant Name | Address | Role | Actions |
|-------------------------|----------------------|----------------------|---------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| No data to display | | | |
| No data to paginate < > | | | |

ADD DEFAULT STAFF Export [Print] [Refresh] [Filter]

| Staff Name | Role | Actions |
|-----------------------------|----------------------|------------|
| <input type="text"/> | <input type="text"/> | |
| (Case Creator) | | [Edit] [X] |
| Page 1 of 1 (1 items) < 1 > | | |

CLOSE

If you reached this panel by choosing Edit SOL for Selected in the right-click menu, the panel will function slightly differently. The only SOLs, default defendants, and default staff members listed in the respective tables will be those listed in the individual tables of every selected case type. Anything that is entered into, or deleted from, any table in this panel will apply to *every case type selected*. Do not make changes using this method that you do not want to apply identically to all of your selections. Any SOLs, default defendants, and default staff members that are in some of the selected case types but not others will be unaffected by changes made in this panel.

Retainer Staff

The Retainer Staff Management administrative page allows you to assign staff members to cases of a certain type automatically once the cases are retained by your firm. This allows you to efficiently pass cases along to your dedicated pre-litigation team for that case type. Retainer staff management is accomplished by adding rules to the SmartAdvocate system. Each rule consists of the case type it applies to, a staff member, and a role; the staff member will automatically be assigned, in the role chosen, to cases of that type once they are retained. Any staff members assigned to the case at the time it is opened, such as an intake paralegal, will be automatically removed from the case when it is retained if there is at least one retainer staff rule applying to that case type.

| Case Type | Staff | Office | Role | Comments | Actions |
|----------------------|-------------------|--------|-------------------|----------|------------|
| Accutane - Not death | Kraemo,Yana | (All) | Attorney | Testing | [Edit] [X] |
| Accutane - Not death | Batz,Daphanara | (All) | Paralegal | | [Edit] [X] |
| Actos - Death | Aleksandrov,Iurly | (All) | Primary Paralegal | | [Edit] [X] |
| Actos - Death | Batz,Daphanara | (All) | Primary Attorney | | [Edit] [X] |
| Actos - Death | 55 | (All) | Attorney | | [Edit] [X] |
| Auto Accident | Aleksandrov,Iurly | (All) | Managing Attorney | | [Edit] [X] |

Adding a Retainer Staff Rule

The fields in this panel are:

Add/Update Retainer Staff

Case Type:* **1**

Staff:* **3**

Office: **2**

Role:* **4**

Comments: **5**

UPDATE **CANCEL**

1. Case Type: A dropdown allowing you to select which case type the role assignment will apply to.
2. Office: A dropdown allowing you to select which Office the role assignment will apply to.
3. Staff: A dropdown allowing you to select the staff member to be assigned.
4. Role: A dropdown allowing you to select what role the staff member will be assigned to the case as.
5. Comments: A comment box to allow comments related to the rule.

System Parameters

The System Parameters page contains a list of various adjustable settings of your SmartAdvocate system. Unlike the User Preferences panel, which only apply to the specific user ID for which any changes are made, the settings on this page apply to all of the users of the system. Because of the wide variety of settings that can appear here, and the occasional addition of custom settings for individual firms in answer to requests, the list of parameters in your system may not exactly match the one provided here.

Parameters not listed below generally should not require any user input or changes to their current settings. If you have any questions regarding any of these parameters, please contact the SmartAdvocate support team at support@smartadvocate.com.

Each parameter in the list below is presented in the following format:

[Group Description] Parameter Description: Explanation of what the parameter does.

The Parameter List

[Calendar] Warn about appointment conflicts (holidays, etc): If the parameter is set to True, when you attempt to set an appointment during either a holiday or an existing appointment of which one of the new appointment's attendees is also an attendee, a panel will appear informing you of the conflicts, and you will have the opportunity either to change the scheduling of the new appointment or to schedule the conflicting appointment anyway. If the parameter is set to False, no panel will appear and the conflicting appointment will simply be scheduled.

[Calendar] Warn when appointments are scheduled in the past: If the parameter is set to True, when you attempt to set an appointment that begins earlier than the current date and time, a panel will appear informing you that the scheduled appointment is in the past, and you will have the opportunity either to change the scheduling of the new appointment or to schedule the past appointment anyway. If the parameter is set to False, no panel will appear and the past appointment will simply be scheduled.

[Calendar] Warn when appointments are scheduled outside of work hours. (before 8am, after 6pm): If the parameter is set to True, when you attempt to set an appointment that either begins before the office opening time or ends after the office closing time, a panel will appear informing you that the scheduled appointment is outside of work hours, and you will have the opportunity either to change the scheduling of the new appointment or to schedule the off-hours appointment anyway. If the parameter is set to False, no panel will appear and the off-hours appointment will simply be scheduled. Note: the parameter *description* does not change even if your office hours are changed (see the next two parameters), however the *functionality* will change to reflect the office hours as set under Office closing time and Office opening time.

[Calendar] Office closing time: The time of day your office closes. This is used if your system is set to warn you about off-hours appointments, and it is also used in certain calendar views; the office hours of operation are shaded slightly differently than the rest of the day.

[Calendar] Office opening time: The time of day your office opens. This is used if your system is set to warn you about off-hours appointments, and it is also used in certain calendar views; the office hours of operation are shaded slightly differently than the rest of the day.

[Case] Contacts to appear in all cases as available To and From selections: Every contact selected in this parameter will appear in the To and From dropdowns when attaching documents or generating a barcode, for every case. This is useful for contacts that may be involved in many cases, or send or receive correspondence about many cases, but would not necessarily be included in any of the areas in SmartAdvocate that would automatically add them as case contacts. For example, regularly used per diem attorneys may be selected in this parameter.

[Disbursement] Default case disbursement limit: The disbursement limit for all cases where the disbursement limit has not been manually set, nor automatically set in association with the case's estimated case value. See [Disbursements](#) for a further explanation of disbursement limits.

[Critical Deadline Group] Max Days to Serve Summons and Complaint after Filing: When you enter a date in the Date of Filing S&C field in the Add/Edit Defendant SOL panel in the [Critical Deadlines](#) page, the Last Date to Serve S&C field will automatically be set to a certain number of days after that date. This parameter sets the number of days between those two fields. Any setting in this parameter will be a default for the system, however the default can be overridden by entering a different number of days in the States Picklist.

[Case Summary] Show pending activities in reversed order (from future to past): If the parameter is set to True, the Pending Appointments area in the [Case Summary](#) page will show the appointment farthest in the future at the top of the list, going back to the earliest appointment date at the bottom. If the parameter is set to False, the list will have the earliest date at the top and the latest date at the bottom.

[Case Wizard] Add empty defendants for all possible defendant roles if no default defendant selected: If the parameter is set to True, then if a case type has no default defendant, and no defendant is added at the time the case is created, then every defendant role associated with the case type will be added as a defendant in the case, with no contact associated. This will make visible in the case file all of the possible defendant roles for that case type, and all of the possible SOLs associated with those roles; however, you will need to delete the empty defendants manually when you enter the real defendants in the case. If the parameter is set to False, this behavior will not occur.

[Case Wizard] Show Plaintiff/Defendant in another case warnings: If the parameter is set to True, then if you attempt to add a plaintiff in the Case Wizard that is already entered as a defendant in some other case (or if you attempt to add a defendant that is already entered elsewhere as a plaintiff), a warning will appear. If the parameter is set to False, no warning will appear.

[Case Wizard] Show Defendant tab on Case Wizard: If the parameter is set to True, then the defendant tab will appear when entering a new case in Case Wizard. It will not be necessary to complete this tab, if shown, however. If the parameter is set to False, no defendant tab will appear in Case Wizard. Regardless of this setting, defendants can be edited and added to a case from Defendant > Summary > Add Defendant.

[Alerts] Critical Alert for Defendant Exists as Plaintiff: If the parameter is set to True, then if a defendant in some case is listed as a plaintiff in another case, when a user visits the [Case Summary](#) page of either case, a Critical Alert will appear notifying the user of that fact. If the parameter is set to False, that situation will not cause a Critical Alert to appear.

[Documents] Network path to store documents created during Mass Mail generation: The location of a folder in the network file structure. When a user selects the Open or Download option after generating multiple documents using the [Mass Mailing](#) tool, SmartAdvocate creates a single document consisting of all of the generated documents, one after the other. This single document does not belong to any one case; the folder location in this parameter is where such documents are stored after they are created. (The documents are separated into folders within that location based on the user who generated the documents.)

[Documents] Default direction for attached documents: The default selection in the Direction field when attaching a document. If the parameter is 1, Incoming is selected by default. If the parameter is 2, Outgoing is selected by default. If the parameter is 3, Memo is selected by default. If the parameter is anything else, nothing is selected by default.

[Documents] Default direction for Barcoded documents: The default selection in the Direction field when generating a barcode. If the parameter is 1, Incoming is selected by default. If the parameter is 2, Outgoing is selected by default. If the parameter is 3, Memo is selected by default. If the parameter is anything else, nothing is selected by default.

[Documents] Use SmartAdvocate Document Handler for opening documents: The SmartAdvocate Document Handler component can automatically download document when you need to open or edit them. This is particularly useful for SmartAdvocate Cloud users by making it easier to eliminate the need for manual download/upload of documents. It can also be used by remote users who are not using VPN or by whole law firms who want to eliminate the need to share CMS\Case Documents folder.

The Document Handler can be set for all users (instead of using the Document Launcher) globally in the System Parameters admin page, by setting the item with Parameter Description "Use SmartAdvocate Document Handler for opening documents" to True, which is useful for SmartAdvocate Cloud customer. However, for SmartAdvocate Server customers, who may occasionally access the system from outside their firm's network, you don't need to use the setting in System Parameter if you don't want to change it for local users, who are already able to access documents normally using the Document Launcher. Individual users can utilize this feature by going to their User Preferences (click their name in the upper right of any SmartAdvocate page and click User Preferences) and selecting the "Download documents for editing" item in the Documents And Emails section.

Either way, when a user with that setting tries to open a document for the first time, a popup will appear prompting the user to download the Document

Handler application package. The user should then open the downloaded package, run the setup.exe file in it, then click the Open Document button in the prompt on the Documents page (and then the My Document Opened button so the popup doesn't always appear in the future). If prompted with an "Open SmartAdvocate Document Handler?" prompt, users should click the Open option (and can optionally select "Always open these types of links in the associated app", which may prevent that prompt in the future).

[Email Settings] When set to True from field in the emails will use "FirstName LastName" format, otherwise "LastName, FirstName" format will be used: Determines the format of the From field in emails sent by SmartAdvocate. If the parameter is set to True, the field will be formatted like "John Smith." If the parameter contains anything else, the field will be formatted like "Smith, John."

[Dashboards] Case statuses for Intake Follow-up Dashboard. Only cases in those statuses will be displayed on the Intake Follow-up Dashboard: This parameter imposes a limit on which cases appear in the Intake Follow-up Dashboard. Cases that are not in one of the statuses selected in this parameter do not appear in that dashboard.

[Login] Maximum number of user login attempts. Account will be locked if number of attempts is exceeded: If someone attempts to log in as a particular user more than a specified number of times consecutively with the wrong password, the user account will be marked Locked, meaning that no one may log in as that user, even with the correct password, until an administrator unlocks the account. (Unlocking an account is performed in the Users administrative page.) This parameter specifies the number of incorrect attempts before the account is locked.

[Medical Provider Lienor Types] Type of lienor to be used when copy bills to liens is used for individual providers: In the [Medical Providers](#) page, right-clicking on a provider or a bill will bring up options for copying the bill (or all bills from that provider) directly as liens to the [Lien Tracking](#) page, with the provider listed as the lienor. This parameter determines the lienor type automatically assigned to that lienor when the bills are copied, if the lienor is an Individual contact.

[Medical Provider Lienor Types] Type of lienor to be used when copy bills to liens is used for organizations: In the [Medical Providers](#) page, right-clicking on a provider or a bill will bring up options for copying the bill (or all bills from that provider) directly as liens to the [Lien Tracking](#) page, with the provider listed as the lienor. This parameter determines the lienor type automatically assigned to that lienor when the bills are copied, if the lienor is an Organization contact.

[Contact] Maximum number of contacts that can be merged: When using the Merge Contacts mass action in the Contacts List [Search Results](#) page, if you attempt to merge more than a specified number of contacts you will not be allowed to do so and a message will appear indicating that you are merging too many contacts. This is meant to prevent accidentally selecting and ultimately losing more contacts than intended. This parameter specifies the maximum allowed number of contacts that can be merged at one time.

[Negotiation] Show No Fault carriers on Settlement/Negotiation screen: If the parameter is set to False, insurance companies of a No Fault type will not appear as options when selecting a company in the Negotiating with or Settlement with fields when adding a negotiation or settlement in the [Negotiation/Settlement](#) page. If the parameter is set to True, all insurance companies in the case will appear as options.

[Automatic Notes] Show added appointments as Notes: If the parameter is set to True, then when appointments are added in a case a note will automatically also be added in the case listing the appointment details. If the parameter is set to False, that situation will not cause a note to be added.

[Automatic Notes] Show critical comments as Notes: If the parameter is set to True, then when critical comments are added in a case a note will automatically also be added in the case including the critical comment. If the parameter is set to False, that situation will not cause a note to be added.

[Automatic Notes] Show added medical request documents as Notes: If the parameter is set to True, then when documents fulfilling a medical records request are added in a case a note will automatically also be added in the case listing the details of the fulfilled request. If the parameter is set to False, that situation will not cause a note to be added.

[Automatic Notes] Show negotiations as Notes: If the parameter is set to True, then when negotiations are added in a case a note will automatically also be added in the case listing the negotiation details. If the parameter is set to False, that situation will not cause a note to be added.

[Automatic Notes] Show sent and received Text messages (SMS) as Notes: If the parameter is set to True, then when text messages are sent or received through SmartAdvocate in a case a note will automatically also be added in the case including the text message. If the parameter is set to False, that situation will not cause a note to be added.

[Automatic Notes] Show completed tasks as Notes: If the parameter is set to True, then when tasks are completed in a case a note will automatically also be added in the case listing the task details. (This note is separate from the optional note that can be added by the user when a task is completed.) If the parameter is set to False, that situation will not cause a note to be added.

[Postage Cost] Cost of 1 oz package: When you generate a document for a medical records request, you have the option of also printing an envelope for the document, and of automatically adding the cost of postage for that envelope, based on the package weight you select, to the [Disbursements](#) for the case. This parameter determines the postage cost added if you select 1 oz as the package weight.

[Postage Cost] Cost of 2 oz package: When you generate a document for a medical records request, you have the option of also printing an envelope for the document, and of automatically adding the cost of postage for that envelope, based on the package weight you select, to the [Disbursements](#) for the case. This parameter determines the postage cost added if you select 2 oz as the package weight.

[Postage Cost] Cost of 3 oz package: When you generate a document for a medical records request, you have the option of also printing an envelope for the document, and of automatically adding the cost of postage for that envelope, based on the package weight you select, to the [Disbursements](#) for the case. This parameter determines the postage cost added if you select 3 oz as the package weight.

[Postage Cost] Cost of 4 oz package: When you generate a document for a medical records request, you have the option of also printing an envelope for the document, and of automatically adding the cost of postage for that envelope, based on the package weight you select, to the [Disbursements](#) for the case. This parameter determines the postage cost added if you select 4 oz as the package weight.

[Postage Cost] Default for "Other" package cost: When you generate a document for a medical records request, you have the option of also printing an envelope for the document, and of automatically adding the cost of postage for that envelope, based on the package weight you select, to the [Disbursements](#) for the case. If you select Other instead of a package weight, you can then enter the cost of postage manually. This parameter determines the default cost when you select Other.

[Settings] Case number format: y000, yy, yyyy, yyyyymm: This parameter contains the case numbering format used by SmartAdvocate's automatic numbering system. It is generally recommended that this parameter not be changed, because changing the parameter will reset the numbering, which can cause confusion and potentially duplicate case numbers. However, if you are certain you wish to change the numbering format, you may do so. Valid formats for this parameter consist of up to three components:

1. A series of zeroes with no other characters in it. The series may be any length. This part of the parameter will be replaced by the automatic numbering, with zeroes padding the left side to ensure that the total number of digits is constant. For example: if the automatic numbering is up to 12, then 00 would be replaced by 12, while 000000 would be replaced by 000012. This component should be in the parameter somewhere, and it is recommended that it contain at least four zeroes, or more depending on the number of cases you create.
2. A series of y's with no other characters in it. The series may be between one and four characters in length. This part of the parameter will be replaced by the digits of the current year, excluding the first digits of the year if there are fewer than four y's. For example: If the current year is 2016, then yy would be replaced by 16, while yyyy would be replaced by 2016. This component is optional but recommended for keeping track of the general age of the case.
3. Exactly two m's with no other characters between them. This part of the parameter will be replaced by the number of the current month. For example: If the current month is January, then mm would be replaced by 01. If the current month is December, then mm would be replaced by 12. This component is optional.

You may include any of these components in any order, but you may not include any of them more than once (for example, 00yy and yy00 would be allowed, but 0yy0 would not be). You may not include any character besides 0, y, and m.

[Settings] Restart the case numbering when year/mnth case prefix changes: This parameter causes the case numbering to reset to 1 (actually to 01, or 0001, or whatever format you have chosen) whenever the year or month case prefix changes. For example, if set to true, if the last case created in 2017 (assuming a yy setting was chosen) was assigned case number 171234, the first case created in 2018 would be assigned case number 180001. If

set to false, the last case created in 2017 (assuming a yy setting was chosen) was assigned case number 171234, the first case created in 2018 would be assigned case number 181235.

[Case] Case name format: This parameter contains the format for new case names in SmartAdvocate. Changing this parameter will not immediately change the names of cases already in SmartAdvocate; however, when edits, additions, or deletions are made to the plaintiffs or defendants in a case on the [Plaintiff Summary](#) or [Defendant Summary](#) page, the name of that case will change to match the current format in this parameter. There are twelve placeholders that can be used in this parameter, which will be replaced by parts of the primary plaintiff's or primary defendant's name in actual case names; any other text in this parameter will appear as-is in case names. All of the placeholders, and the information they are replaced by, are listed within the parameter. The placeholders are:

1. PPR: If the plaintiff is an individual, this placeholder will be replaced by prefix chosen for the plaintiff (Mr., Ms., etc.). If the plaintiff is an organization, this placeholder will simply be removed.
2. PFN: If the plaintiff is an individual, this placeholder will be replaced by the plaintiff's first name. If the plaintiff is an organization, this placeholder will simply be removed.
3. PMN: If the plaintiff is an individual with a middle name, this placeholder will be replaced by the plaintiff's middle name. If the plaintiff is an organization or an individual with no middle name, this placeholder will simply be removed.
4. PMI: If the plaintiff is an individual with a middle name, this placeholder will be replaced by the plaintiff's middle initial (including a period after the initial). If the plaintiff is an organization or an individual with no middle name, this placeholder will simply be removed.
5. PLN: If the plaintiff is an individual, this placeholder will be replaced by the plaintiff's last name. If the plaintiff is an organization, this placeholder will be replaced by the plaintiff's full name.
6. PSU: If the plaintiff is an individual, this placeholder will be replaced by suffix chosen for the plaintiff (Jr., Esq., etc.). If the plaintiff is an organization, this placeholder will simply be removed.
7. DPR: If the defendant is an individual, this placeholder will be replaced by prefix chosen for the defendant (Mr., Ms., etc.). If the defendant is an organization, this placeholder will simply be removed.
8. DFN: If the defendant is an individual, this placeholder will be replaced by the defendant's first name. If the defendant is an organization, this placeholder will simply be removed.
9. DMN: If the defendant is an individual with a middle name, this placeholder will be replaced by the defendant's middle name. If the defendant is an organization or an individual with no middle name, this placeholder will simply be removed.
10. DMI: If the defendant is an individual with a middle name, this placeholder will be replaced by the defendant's middle initial (including a period after the initial). If the defendant is an organization or an individual with no middle name, this placeholder will simply be removed.
11. DLN: If the defendant is an individual, this placeholder will be replaced by the defendant's last name. If the defendant is an organization, this placeholder will be replaced by the defendant's full name.
12. DSU: If the defendant is an individual, this placeholder will be replaced by suffix chosen for the defendant (Jr., Esq., etc.). If the defendant is an organization, this placeholder will simply be removed.

Examples: If the primary plaintiff is John Zachary Smith and the defendant is The State of New York, the format "PFN PMI PLN versus DLN" would yield the case name "John Z. Smith versus The State of New York". The format "PLN, PFN PMN v. DLN, DFN" would yield the case name "Smith, John Zachary v. The State of New York," (for this reason, this format would be recommended against if you might have an organization as the plaintiff or defendant; see below). The format "The case of PFN against DFN" would yield the case name "The case of John against " (obviously also not recommended).

If this parameter is left blank, it will be treated as if it contained "PLN v. DLN". Because of the significant difference between the way individuals' names and organizations' names are treated in the placeholders, it is recommended that you use the default format or something similar if you expect the primary defendant (or plaintiff) will be an organization in some of your cases and an individual in others. You could change this format repeatedly, on a case-by-case basis, to account for the difference, but that is unlikely to be worth the inconvenience.

[Document Templates] Path to Document Templates Folder: The location of a folder in which document templates are stored within the network file structure. The folder location in this parameter should be where templates are saved when using the Word plugin; it is where the SmartAdvocate system will find them when you use a template to generate a document.

[Password Enforcement] Password complexity policy on/off: Whether the additional Password Enforcement parameters (see below) are enforced against a user's password. If set to False, the other Password Enforcement parameters will have no effect, regardless of their settings. If set to True, the other Password Enforcement parameters will govern the use of passwords in the system.

[Password Enforcement] Password expiration policy on/off: Whether a user's password will automatically expire after a set period of time. If set to True, after a password has expired, the user will be required to create a new password when accessing SmartAdvocate. If set to False, the password expiration policy will not be applied.

[Password Enforcement] Password expiration days value: The length of time a user's password remains valid. The first time a user attempts to access SmartAdvocate after the expiration of the designated time period, he or she will be required to create a new password. As noted above, this parameter will have no effect unless the **Password expiration policy on/off** parameter is set to True.

[Password Enforcement] Password complexity numbers on/off: Whether the system will require that passwords include at least one letter and one number. If set to False, it will not be required that a password include a number. If set to True, a password must include at least one number. As noted above, this parameter will have no effect unless the **Password complexity policy on/off** parameter is set to True.

[Password Enforcement] Password complexity special characters on/off: Whether the system will require that passwords include at least one special character. If set to True, a password must include at least one special character. If set to False, it will not be required that a password include a special character. As noted above, this parameter will have no effect unless the **Password complexity policy on/off** parameter is set to True.

[Password Enforcement] Password complexity uppercase and lowercase letters on/off: Whether the system will require that passwords include at least one lower case letter and one upper case letter. If set to True, a password must include at least one lower case and one upper case letter. If set to False, it will not be required that a password include both lower case and upper case letters. As noted above, this parameter will have no effect unless the **Password complexity policy on/off** parameter is set to True.

[Password Enforcement] Password minimum length policy on/off: Whether the Password minimum length value parameter is enforced against a user's password. If set to True, a password must consist of at least the number of characters set in Password minimum length value parameter. If set to False, the Password minimum length value parameter will have no effect, regardless of its setting. As noted above, this parameter will have no effect unless the **Password complexity policy on/off** parameter is set to True.

[Password Enforcement] Password minimum length value: The minimum length required by the system for a password. This parameter will have no effect unless both the **Password complexity policy on/off** and the **Password minimum length policy on/off** parameters are set to True.

[Medical Records] SSN is required for medical records requests: Whether a client's Social Security Number is required when requesting medical records. When set to True users won't be able to request medical records unless the client's contact card has his or her SSN entered.

Task groups are collections of task templates. They are primarily used in the [Add Multiple Tasks](#) function in a case, but are generally useful for denoting a set of tasks that are all likely to need completing at roughly the same phase of a case (e.g. a task group for discovery-related tasks), or that are likely to need completing in a particular type of case (e.g. a task group for auto-accident-related tasks). If you have created a large number of Task Templates, using task groups to exclude templates you are unlikely to need for a particular situation can simplify the process of assigning tasks. The Task Groups administrative page is where you can create and manage task groups. The page contains a table listing all of the Task Groups in the SmartAdvocate system. The table's columns are:

- Group Name: The name of the task group.
- Task Templates: A list of all the templates in the task group. If this column contains "All," all templates are included.
- Case Groups: A list of all the case groups for which the task group is available when adding tasks.
- Actions: An action column containing an [Edit icon](#) and a [Delete icon](#).

| Group Name | Task Templates | Case Groups | |
|------------------|--|---|--|
| CA Intake | some QA test | Class Actions | |
| Case Opening | Client Ien letter, Wen Test 1, some QA test | | |
| Client Follow Up | 30 Day Client Follow Up, Training, some QA test | All | |
| Discovery | Discovery Demand, Get Expert Information, some QA test | Medical Malpractice, General Practice, General Negligence, Construction Accidents, Auto Accidents | |
| Intake | Send Retainer, some QA test | | |

You can also create a new task group in this page. The add/edit form contains a text input field for the group name, and checkbox-select dropdowns for task templates and case groups. By default, All is chosen for both task templates and case groups. To choose specific task templates and/or case groups for a new task group, you must first uncheck the All checkbox(es).

Edit Form

Group Name: *

Task Templates: All

Case Groups: All

Save Cancel

Task Templates

Task templates are useful tools that simplify the process of adding tasks in a case. Tasks that frequently need to be performed can be saved as templates, which can then be selected when adding a task to automatically fill in all of the details of that task. Task templates can even be used to trigger case status changes and/or automatically assign new tasks on completion. The Task Templates administrative page is where you can create and manage task templates. The page contains a table listing all of the task templates in the SmartAdvocate system. The table's available columns are:

| Task Name | Type | Task Groups | Priority | Subject | Due Date Shift (days) | Default Assignee Role | Description | Document Template | Document Template Keyword | Note Type | Case Group | Linked Tasks | Action |
|--|----------------------|--|----------|-------------------------|-----------------------|-----------------------|--|-------------------|---------------------------|-----------|----------------------------|--------------|--------|
| 30 Day Client Follow Up | Follow-Up | Client Follow Up | High | 30 Day Client Follow Up | 30 | Paralegal | Actos - Bladder Cancer (Non-Filed Cases) Status Letter - FINAL - July 2012 | | | Contacts | All | | |
| Client Ien letter | Send letter/document | Case Opening | Normal | | 20 | Paralegal | | | | Lens | XXXNursing Home Negligence | | |
| Confirm Release & Consent Returned by Client | Follow-Up | CA Intake, Case Opening, Client Follow Up, Discovery | Normal | | 10 | Paralegal | T_Yana_Test0 | | | | All | | |

1. Task Name: The name of the task template. When adding multiple tasks using the [Add Multiple Tasks](#) function, the name of the template is used as the subject of the task.
2. Task Category: The category of the task created when using this template.
3. Task Groups: A list of all the task groups containing the task template.
4. Priority: The priority level of the task created by using this template.
5. Subject: The subject of the task template.
6. Due Date Shift (days): The number of days after the day the task is assigned that it will be due.
7. Default Assignee Role: The staff role whose occupant will be set as the "Assigned To:" staff member when the task is added if that role is present in the case staff.
8. Description: A description of the task template. When adding multiple tasks using templates, the description of the template is used as the description of the task. However, when adding a single task using a template, the description of the template is used as the *subject* of the task.
9. Document Template: The document template that will be generated when the Perform Task icon for the task is clicked, if any.
10. Document Template Keyword: Not currently functional; may be implemented in a future version.
11. Note Type: A list of all the note types that, if added to a case while this task is incomplete, will trigger an option to mark this task complete. (See below for clarification.)
12. Case Group: The case groups for which the task template will appear in the list of Status Based task templates. If this column contains "All," all case groups are included. (See note below.)
13. Linked Tasks: A list of all the tasks that are automatically generated upon the completion of this task.
14. Actions: An action column containing an [Edit icon](#) and a [Delete icon](#).

You can also add a new task template by clicking the Add Task Template button. The add/edit form contains the following fields:

The image shows a screenshot of a task configuration form. The fields are numbered 1 through 17. Fields 1-7 are text input fields. Fields 2, 3, 4, 9, 10, 11, 12, 14, 15, and 17 are dropdown menus. Fields 8 and 13 are text input fields with a question mark icon. Fields 14 and 15 are checkbox-select dropdowns. Fields 16 and 17 are dropdown menus with question mark icons. The form is organized into sections: Task Name, Task Groups, Type, Note Type, Priority, Subject, Description, Due Date Shift, Primary Assignee Role, Secondary Assignee Role, Default Assignee, Document Template, Document Template Keyword, Case Groups, Case Statuses, Automatic Status Change, and Automatic Task Generation on Completion.

1. Task Name: A text input field.
2. Task Groups: A multi-select checkbox dropdown.
3. Type: A dropdown. Determines Task Type.
4. Note Type: A multi-select checkbox dropdown. There is a question-mark icon that, when hovered over, displays the text, "When note of this type is added to the case, user will be offered to mark this task complete." The purpose of this feature is to allow you to create a note indicating that you have accomplished the necessary action while simultaneously clearing the task from SmartAdvocate. So, for example, if the task were to call a client, you might set the note type to Plaintiff - Contacted. Then, rather than have to separately note the contact and mark the task complete, you could do both at once by simply adding a Plaintiff - Contacted note.
5. Priority: A dropdown.
6. Subject: A text input field. A brief statement of the subject of the Task Category can be entered here.
7. Description: A text input field. A more detailed description of the Task Category can be entered here.
8. Due date shift (in days): A text input field. There is a question-mark icon that, when hovered over, displays the text, "Default due date (in days from now)."
9. Primary Assignee Role: A dropdown. Determines Default Assignee Role. See note below.
10. Secondary Assignee Role: A dropdown. See note immediately below.
11. Default Assignee: A dropdown. Note: Primary Assignee Role, Secondary Assignee Role, and Default Assignee are all potentially used to determine the staff member listed in the "Assigned To:" field when the template is chosen. However, there is a hierarchy. If Primary Assignee Role contains a role (i.e. is not blank), then if that role exists in the case, its occupant will be the one listed. If it contains a role but that role does not exist in the case, then *the staff member assigning the task* will be the one listed, regardless of the contents of Secondary Assignee Role or Default Assignee. If Primary Assignee Role is left blank, then Secondary Assignee Role behaves in much the same way as Primary Assignee Role. If it contains a role that exists in the case, its occupant will be the one listed. If it contains a role that does not exist in the case, the assigning staff member will be the one listed. If it is also blank, then the staff member selected in Default Assignee will be the one listed. If all three are blank, then the staff member assigning the task will be the one listed.
12. Document Template: A dropdown. There is a question-mark icon that, when hovered over, displays the text, "Generate document" with this id when perform task action is selected."
13. Document Template Keyword: A text input field.
14. Case Groups: A checkbox-select dropdown. See note immediately below.
15. Case Statuses: A checkbox-select dropdown. Note: Case Groups and Case Statuses are all potentially used to determine whether the task template will appear in the list of Status Based task templates. However, there is a hierarchy. If Case Groups contains at least one group (i.e. is not blank), then if a given case is in one of the case groups included the template will appear in the list for that case, regardless of the content of Case Statuses. If Case Groups contains at least one group, and a given case is not in any of the case groups included, the template will not appear in the list for that case, regardless of the content of Case Statuses. If Case Groups is left blank, then Case Statuses will determine whether the template appears in the list for a given case. If Case Statuses contains at least one status, and a given case's status is one of the statuses included, the template will appear in the list for that case. If Case Statuses contains at least one status, and a given case's status is not one of the statuses included, the template will not appear in the list for that case. If Case Statuses is also blank, then the template will not appear in the list for that case (or any case).
16. Automatic Status Change: contains two dropdowns, one for New Status and one for From Status. New Status has a question-mark icon that, when hovered over, displays the text, "New Case status after task is marked as complete." From Status has a question-mark icon that, when hovered over, displays the text, "Only change status if current status was this one." If New Status is empty, completing the task has no effect on the case status. If New Status contains a status, and From Status is empty, completing the task changes the case status to the one in New Status, regardless of its prior status. If New Status and From Status both contain statuses, completing the task changes the case status to the one in New Status *only* if its status was the one in From Status at the time the task was completed.
17. Automatic Task Generation on Completion: A checkbox-select dropdown. Determines Linked Tasks.

Read more about [Text Message Templates](#).

Read more about [Task Groups](#).

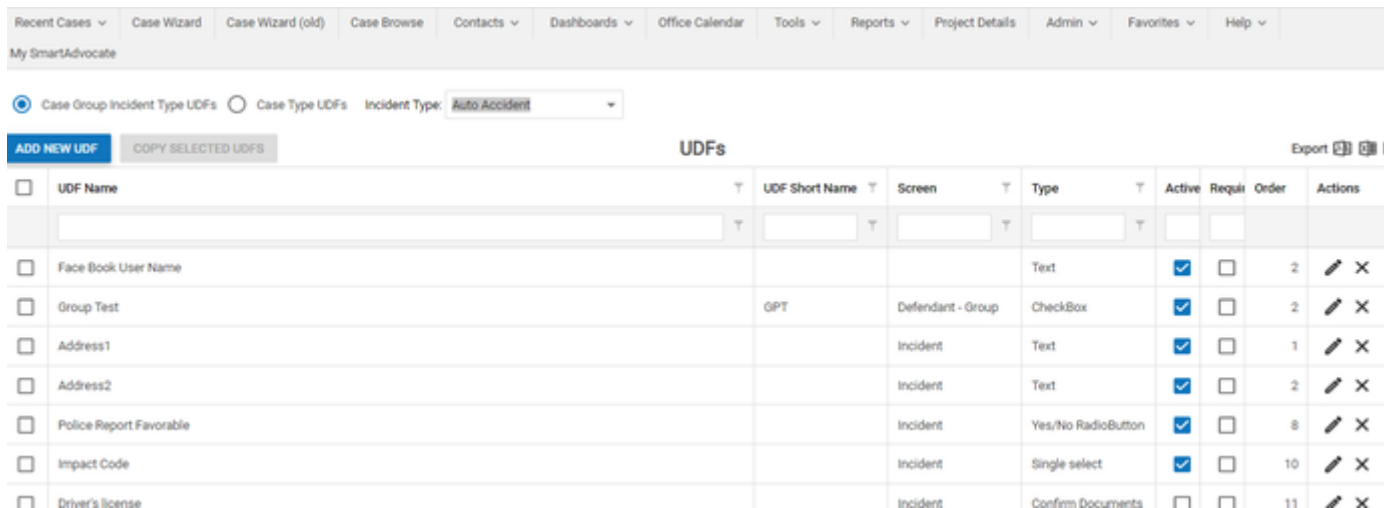
Read more about [WorkPlans](#).

Template Pages Configuration

This page is currently under construction. Check back for updates!

UDF Editor

User-defined fields, or UDFs, offer enormous flexibility in collecting and retrieving information about your cases. UDFs are questions or data prompts that you create, and you can also select the way the information is entered into the system (e.g. a text input field, a set of radio buttons, a dropdown list, etc.). The information appears in that case's various UDF screens (see below for a listing of the UDF screens) and can be searched in [Case Browse](#) if you limit your search to a single case type. The UDF Editor administrative page is where UDFs are created and managed. The page contains a table below a pair of radio buttons labeled Case Type UDFs and Incident Type UDFs, and a dropdown containing all of the case types or all of the incident types in the system (whichever radio button is selected). Selecting a case type or an incident type will populate the table with all the UDFs for that type.



The screenshot shows the UDF Editor interface. At the top, there is a navigation bar with various menu items like 'Recent Cases', 'Case Wizard', 'Case Wizard (old)', 'Case Browse', 'Contacts', 'Dashboards', 'Office Calendar', 'Tools', 'Reports', 'Project Details', 'Admin', 'Favorites', and 'Help'. Below the navigation bar, there are radio buttons for 'Case Group Incident Type UDFs' (selected) and 'Case Type UDFs', and a dropdown menu for 'Incident Type' set to 'Auto Accident'. The main area is titled 'UDFs' and contains a table with the following columns: UDF Name, UDF Short Name, Screen, Type, Active, Requi, Order, and Actions. The table lists several UDFs:

| UDF Name | UDF Short Name | Screen | Type | Active | Requi | Order | Actions |
|-------------------------|----------------|-------------------|--------------------|-------------------------------------|--------------------------|-------|---|
| Face Book User Name | | | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 2 | Edit Delete |
| Group Test | GPT | Defendant - Group | CheckBox | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 2 | Edit Delete |
| Address1 | | Incident | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 1 | Edit Delete |
| Address2 | | Incident | Text | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 2 | Edit Delete |
| Police Report Favorable | | Incident | Yes/No RadioButton | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 8 | Edit Delete |
| Impact Code | | Incident | Single select | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 10 | Edit Delete |
| Driver's license | | Incident | Confirm Documents | <input type="checkbox"/> | <input type="checkbox"/> | 11 | Edit Delete |

The table's columns are:

- **UDF Name:** The question, prompt, or classification of the UDF; i.e., the description of the information stored in the UDF. For UDFs in the Case Wizard or Incident Wizard screen, it is recommended that the name be in the form of a question or request (to be asked during intake); otherwise, either a question or a simple description (e.g. "Cholesterol Level") should be equally useful.
- **Screen:** Where the UDF should appear among the various UDF pages. However, not all of the possible choices have a precisely corresponding UDF page. Case, Court, Defendant, Expert, PFS (Plaintiff Fact Sheet), Plaintiff, and Other (all of which are only available for case type UDFs) correspond to [Case UDF](#), [Court UDFs](#), [Defendant UDFs](#), [Expert UDFs](#), [Plaintiff Fact Sheet](#), [Plaintiff UDFs](#), and Other UDFs respectively. Case, Defendant, and Plaintiff also correspond to their respective radio buttons in the UDF tab of Case Browse. The other three possibilities for Screen in a UDF listing, Case Wizard (available only for case type UDFs) and Incident and Incident Wizard (both of which are available only for incident type UDFs), all result in that UDF appearing in the [Incident](#) page of a case, and the Incident radio button in the UDF tab of Case Browse. The Incident page does not exclusively contain UDFs, but it does have a UDF area that contains UDFs of these three Screen types. Additionally, Case Wizard and Incident Wizard UDFs appear in the Case Wizard when creating a case of the associated type.
- **Type:** The format of the field itself, e.g. Text for a text input field or Dropdown for a dropdown list, etc.
- **Active:** A checkbox. If checked, the UDF appears in its respective UDF screen (and Case Wizard if applicable, and in the Case Browse search). If not, it does not.
- **Order:** An integer determining the order in which UDFs appear in their respective screens. UDFs are sorted by their Order number, but, for example, it is not necessarily true that the first appearing UDF has an Order number of 1; it is only certain that no other UDF has a smaller number. (In fact, Order numbers can theoretically be negative.) However, when you select the screen for a new UDF (or change the screen of an existing one), its Order number will default to the number that is greater by one than the currently highest Order number among the UDFs for that screen (or to 1 if there is currently no UDF in that screen). It may be useful to set your UDFs' Order numbers such that they are spaced several numbers apart (for example, in increments of ten), in case you later decide to add a new UDF somewhere in the middle. Additionally, the three Screen options that feed to the Incident page behave slightly differently with respect to their Order number. All UDFs set to the Case Wizard screen will appear later than all UDFs set to the Incident or Incident Wizard screen, regardless of Order (though their arrangement within the Case Wizard-screen UDFs will be determined by the Order number). However, the Incident and Incident Wizard screen UDFs share a set of Order numbers; i.e. if an Incident-screen UDF has a lower Order than an Incident Wizard-screen UDF, the Incident-screen UDF will appear first, but the reverse is also true. (This only applies in the Incident page of a case and the UDF tab of Case Browse, since Incident-screen UDFs do not appear in the Case Wizard at all.)
- **Actions:** An action column containing the hypertext words Edit and Delete (serving the functions of an [Edit icon](#) and a [Delete icon](#)).

You can create new UDFs by clicking the Add new UDF button at the top right of the table (as opposed to the usual top left). You can edit the UDF Name, Active, and Order columns directly by clicking their contents and editing them however you choose (clicking the Active checkbox itself is the only editing that can be done in the Active column, since it is a yes/no column). To keep the changes, click "Save changes" at the bottom right of the table. To undo all changes (which will also remove the light green background), click "Cancel changes" at the bottom right. Leaving or reloading the page before saving will also discard the changes (although you will be prompted to confirm that you wish to leave or reload the page). The more general add/edit form contains the following fields:

- **Text:** A text input field. Corresponds to UDF Name.
- **Type:** A dropdown.
- **Screen:** A dropdown.
- **Short Name:** A text input field. Giving a UDF a short name is optional. If you do, it will become available for use as a merge code.
- **Order:** A numeric input field.
- **Display in single column:** A checkbox. If selected, there will only be one column of UDFs in this screen. If not selected, there will be two columns of UDFs, with the first half of the UDFs on the left and the second on the right (regardless of the length of individual UDFs, so it is possible that the two columns are very uneven).

- Active: A checkbox.

In addition to these permanent fields, depending on the selection in the Type field, it may be necessary to specify the options for the UDF. If so, a table (or in the case of the Question Table type, a text input field and two tables) will appear below the permanent fields. All of the tables have an action column (with the hypertext word New in the heading) and one or two data columns. At most one row of the table will be editable at a time. The action column for the editable row (if there is one) contains the hypertext words Update and Cancel. The action column for non-editable rows contains the hypertext words Edit and Delete. Clicking Update will save the editable row (i.e., make it non-editable) and add an editable row to the bottom of the table. Clicking Cancel will undo any edits since the last time the row was saved and make the row non-editable, unless the row was never saved (i.e., is a newly created row), in which case the row will simply be deleted. Clicking Edit will first cancel any edits made to the current editable row (which may delete it), if there is one; it will then make the row in which Edit was clicked editable. Clicking New will first cancel any edits made to the current editable row (which may delete it), if there is one; it will then add an editable row to the bottom of the table. The types that cause a table to appear are as follows:

- Combobox, Single select, Multiselect, Multiselect DropDown, RadioButton, Dropdown: Each type will contain one data entry column with the heading Value. Each row is an option for selection, labeled with its respective Value.
- Table: Two data columns, with the headings Column Name and Order Number. Each row is a column of the table; the column's heading is the text in Column Name, and the columns are sorted from left to right in the table according to their Order Number in the same way that UDFs are sorted by their Order.
- Question Table: A text edit field with the label Question Column Caption, and two tables labeled Other Columns and Questions. Other Columns has two data columns with the headings Column Name and Order Number; Questions has two data columns with the headings Question and Order Number. Collectively, these fields define a single table, where the first column is a series of questions or prompts, and the remaining columns are various user-defined details comprising the response. The text in Question Column Caption becomes the heading of the first column, and the rows in the Questions table are each rows in the table, with the first column of the table containing the text in Question. The rows are sorted from top to bottom according to the Order Number in the Questions table. The rows in the Other Columns table are each columns in the table after the first one; the heading of each column is the text in Column Name, and the columns are sorted from left to right in the table according to their Order Number (though, again, they are all to the right of the first, Question column).

Users

Each of your staff members will have their own user account in SmartAdvocate. The Users administrative page is where you can manage user accounts. The page contains a table listing all of the user accounts in your SmartAdvocate system. Above the table, the number of user licenses your firm has purchased and the date and time that the current version of the site was built ("Assembly version time") are listed. The table's columns are:


- Login name: The account's user name. The user must input this in the User Name field of the login page when logging in. It is not case sensitive.
- Contact name: The name of the contact associated with the user account. Clicking the text in this column will open the [Contact Card](#) for that contact in a new tab.
- Default case role: The role that staff member occupies when added as a default staff member for a case type.
- Permission Groups: A list of all the user permission groups to which the user belongs.
- Firm role: The user's role in the firm.
- Title: The user's title in the firm.
- Billing Rate: The default billing rate for this user.
- Logged in: Whether the user is currently logged into SmartAdvocate.
- Last Login Time: The date and time the user last logged into the system.
- Last Logout Time: The date and time the user last logged out of the system.
- Workstation Name: The name of the workstation from which the user last logged into the system.
- Last IP: The IP address of the workstation from which the user last logged into the system.
- Mobile: A checkbox indicating whether the user is allowed to use the mobile version of SmartAdvocate.
- Visible: A checkbox indicating whether the user appears in the dropdown when adding staff to a case through the case summary page.
- Active: A checkbox indicating whether the account belongs to a user who currently is granted access to the system.
- Locked: A checkbox indicating whether the user is currently locked out of the account.
- Office: The firm office to which the user is assigned.
- Actions: An action column containing an [Edit icon](#).

You can also create a new user account in this page. The add/edit form contains the following fields:

- Login name: A text input field.
- Password: A password input field. This field will always appear blank when the add/edit form is opened, and any characters typed into it will be masked as bullet points. When editing a user account, leaving this field blank will leave the user's password unchanged. Therefore, unless you are specifically changing the user's password, it is strongly recommended that you leave this field blank when editing an existing user. Something must be entered into this field when creating a new user or you will not be able to save the user.
- Contact name: A [Contact-list dropdown](#).
- Default case role: A dropdown pulling from the [Case Roles](#) picklist.
- Firm role: A dropdown pulling from the [Case Roles](#) picklist.
- Title: A dropdown pulling from the [Case Roles](#) picklist.
- Permission Groups: A checkbox-select dropdown pulling from the [User Permission Groups](#) administrative page.
- Active: A checkbox. Note: User accounts cannot be deleted, in large part because it would cause technical problems with any documents or activity that the user was involved in while the user account existed. For the same reason, we recommend that you *not* simply edit an existing user with the information of the person who will replace the former user. Doing so will replace the former user's information with that of the new user, including on previous actions taken by the former user, making it difficult to determine to whom the system is actually referring. Instead, if a user is no longer using their account (e.g. because they are no longer with the firm), their account should be made inactive. Inactive accounts do not count against the total number of licensed users. In particular, if you are at the limit of licensed users, and you need to switch a new user in for a current user who will become inactive, you must make the current user inactive *first*, before creating the new user, to free up an available license.
- Locked: A checkbox. Note: If a user attempts to log in to their account with the wrong password a certain number of times (which you can set in [System Parameters](#)), their account will be locked (i.e. this checkbox will be automatically selected). In order to unlock the account and let the user log in again, you must manually deselect this checkbox.
- Mobile Application: A checkbox. Corresponds with the Mobile column in the results table.
- Visible: A checkbox. Corresponds with the Visible column in the results table.

| Users | | | | | | | | | | | | | | | | | |
|---|--------------|-------------------|----------------------|--------------|--------------|--------------|-----------|--------------------|--------------------|------------------|---------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------|---------|
| (Number of allowed licensed users : 200 Logged in users : 6 Assembly version: SmartAdvocate 12.04.00.00) | | | | | | | | | | | | | | | | | |
| Login name | Contact name | Default case role | Permission Groups | Firm role | Title | Billing Rate | Logged in | Last Login Time | Last Logout Time | Workstation Name | Last IP | Mobile | Visible | Active | Locked | Office | Actions |
| | | Staff | Administrators,Users | Other Staff | Staff | \$0.00 | N | 8/3/2019 2:50 PM | 8/3/2019 3:26 PM | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| | | Attorney2 | Criminal | Case Manager | Attorney | \$1,000.00 | N | 5/15/2019 10:39 AM | 5/15/2019 10:39 AM | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| | | Case Manager | Administrators | Case Manager | Case Manager | \$0.00 | N | 7/15/2019 4:08 PM | 7/15/2019 4:08 PM | | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| | | Attorney2 | Administrators,Users | Attorney1 | Attorney | \$90.00 | N | 7/26/2019 3:00 PM | 7/26/2019 3:11 PM | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| | | Attorney2 | Users | Attorney1 | Attorney | \$0.00 | N | | | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |



An Edit User Preferences icon () is available in the Actions column. This icon opens the User Preferences panel for the user and allows the Admin to set the User Preferences for that user. The user will be able to change any setting that have been changed by the Admin unless access to User Preferences is blocked in all User Permission Groups of which the user is a member. See User Permission Groups for details on settings for User Permission Groups.

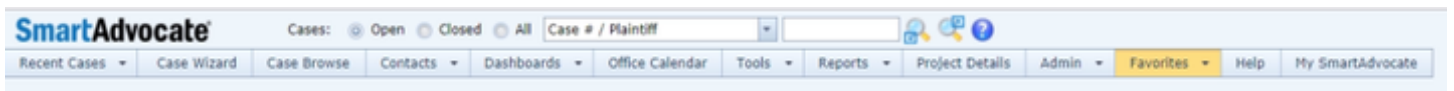
How to replace a user in SmartAdvocate

How To Set Your User Preferences for Email Notifications

Tip of the Week

This page is under construction. Please check back for updates.

Favorites



SmartAdvocate® allows you to save Cases, Filters, SmartAdvocate Pages, External Links, and Calendar Filters to Favorites. This feature allows you can quickly access those specific items by simply choosing from a list.

Add Current Page to Favorites

To add the current page to the Favorites list:

- Click "Favorites" in the Top Tool Bar.
- Click "Add Current Page To Favorites"

The following dialog box will appear

Favorite Page
✕

Please enter favorite name...

Name:

Path:

- Enter a name for this Favorite (it can be any name you choose).
- Leave the default path shown in the Path field.
- Click OK to save or Cancel to exit.

Generate Reports from the My Filters Panel

Save Case Browse Search to your Favorites

Manage Favorites

Managing or Adding items to your Favorites List

1. Click "Manage Favorites" from the Favorites Menu on the [Top Tool Bar](#). The Favorites Setup panel will appear.

| Favorites Setup | | | | |
|-----------------|------------------------------------|-------------------|---|---------|
| Cases | | | | |
| Case No. | CaseName | CaseType | Status | Actions |
| 5015345 | Robinson vs Sroogoe | Auto Accident | LIT 3F - S/C filed but not served | |
| 5015346 | Montgomery -> Eli Lilly | Actos - Not Death | LIT 6 - Depositions and Other Discovery Ongoing | |
| 5015349 | Gingelmyer, John -> Ripspeed, Mary | Auto Accident | Pre-Lit 04 - HT ROU Ordered | |

Add New Cases to Favorites

- To add a new case to your Favorites List, choose "New Case".
- In the Edit Form, enter the Case No.
- Click "Update" to save the new form or click "Cancel" to exit.

The case will be added to your list of "Favorites" and will be available from the "Favorites" Pull Down Menu. From anywhere within a case, you can add it to Favorites by clicking on the Add to Favorites button () on the Quick Action Toolbar.

Add New Filters to Favorites

1. To add a new Filter to your Favorites List, choose "Filter" then "New Filter". The Case Browse feature will appear.

2. Choose the appropriate categories (**Important - Do NOT click "Apply Filters"**).
3. Click "Save Filter To Favorites".
4. Type in the name you want to give to this Favorite in the "Filter Name" dialog box.
5. Click "Save" to save the new Favorite or "Cancel" to exit without saving.

Edit SmartAdvocate Pages in Favorites

A page is added to the Favorites list directly from the "Favorites" Menu by clicking on "Add current page to Favorites" while on the page you want to add to Favorites.

How To *Edit* a SmartAdvocate Page in Favorites

- Click "Favorites" from the Top Tool Bar.
- Click "Manage Favorites".
- Click "SmartAdvocate" Pages.

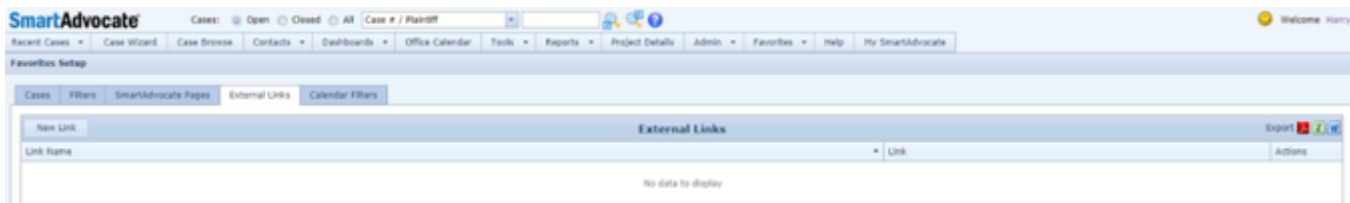
The Page Name, Path and Actions will be displayed for each page that has been saved to Favorites.

- Click the "Pencil" icon under the "Actions" column in the right-hand corner.
- Edit the Page Name and then click "Update" to save or click "Cancel" to exit without saving.

Add External Link

You can add a link to a web page outside SmartAdvocate to Favorites. To add an External Link to Favorites:

1. Access "Favorites" from the Top Menu Bar.
2. Click "Manage Favorites".
3. Click "External Links".
4. Click "New Link".



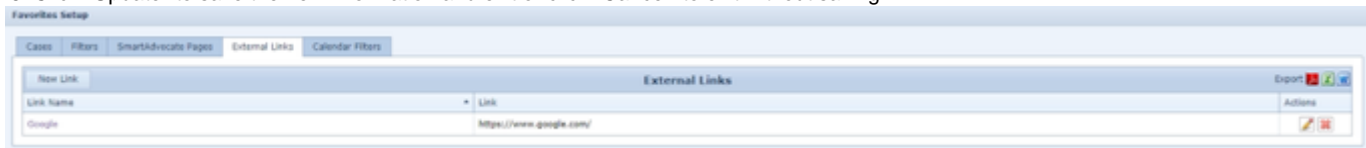
5. Enter the new External Link information.

Edit Form
✕

Link Name:

Link:

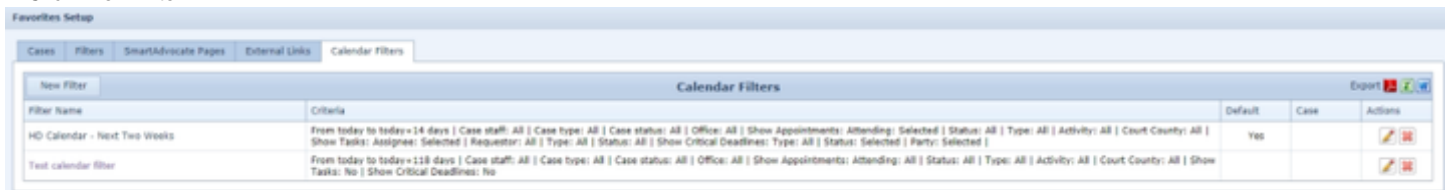
6. Click "Update" to save the new information and exit or click "Cancel" to exit without saving.



Calendar Filters

To add a calendar filter to Favorites:

1. Access "Favorites" from the Top Menu Bar.
2. Click "Manage Favorites".
3. Click "Calendar Filters".
4. Click "New Filter".

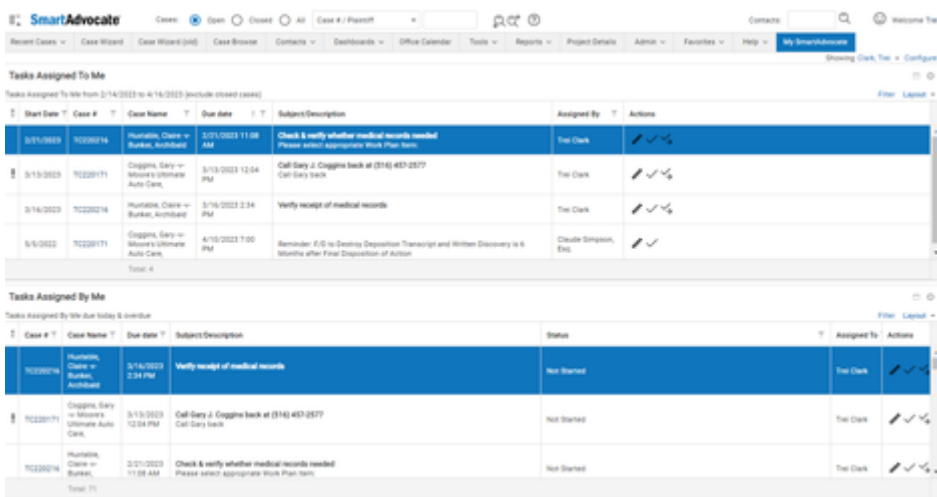


A new browser tab will open and you will be brought to the Office Calendar. See Office Calendar for details of saving a Calendar Filter.

Although both Case and Office Calendar filters can be viewed, edited, and deleted from this page, only Office Calendar filters can be created using the New Filter button. To create a Case Calendar filter, you must be in a Case Calendar.

My SmartAdvocate

My SmartAdvocate is the default screen that will be displayed each time you login to SmartAdvocate. This screen is user customizable and the user can add or remove panels as they wish. For example, the following screen shows "Critical Deadlines," "[My Appointments](#)," and "Tasks Assigned To Me." Navigate the left side menu to view more within the My SmartAdvocate screen.

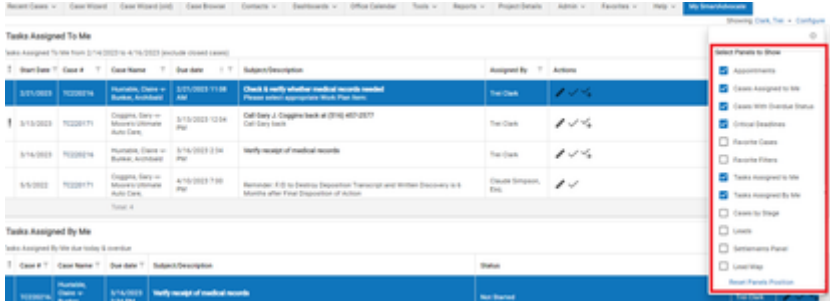


The user can select or deselect panels to be displayed on their My SmartAdvocate Screen by making the appropriate selection from the 'Configure' tab shown in the top right corner of the My SmartAdvocate Screen. (See below.)

Note: Panels can also be closed and removed from your My SmartAdvocate Screen by clicking on the close (X) icon in the top right corner of each individual panel.

The user can also change the order and placement of each panel by dragging and dropping it to the desired location.

Follow the link to learn how to [Configure Panels in My SmartAdvocate](#)

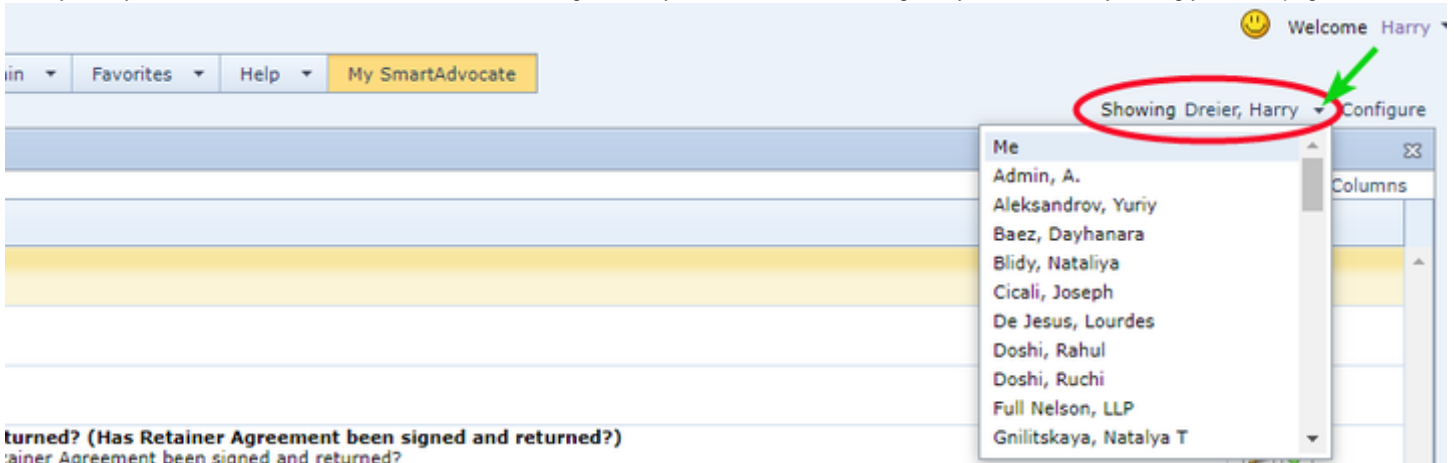


The following panels can be added to your My SmartAdvocate Screen:

- Appointments
- Cases Assigned to Me
- Cases With Overdue Status
- Critical Deadlines
- Favorite Cases
- Favorite Filters
- Tasks Assigned to Me
- Tasks Assigned By Me

View My SmartAdvocate Screen of other Users

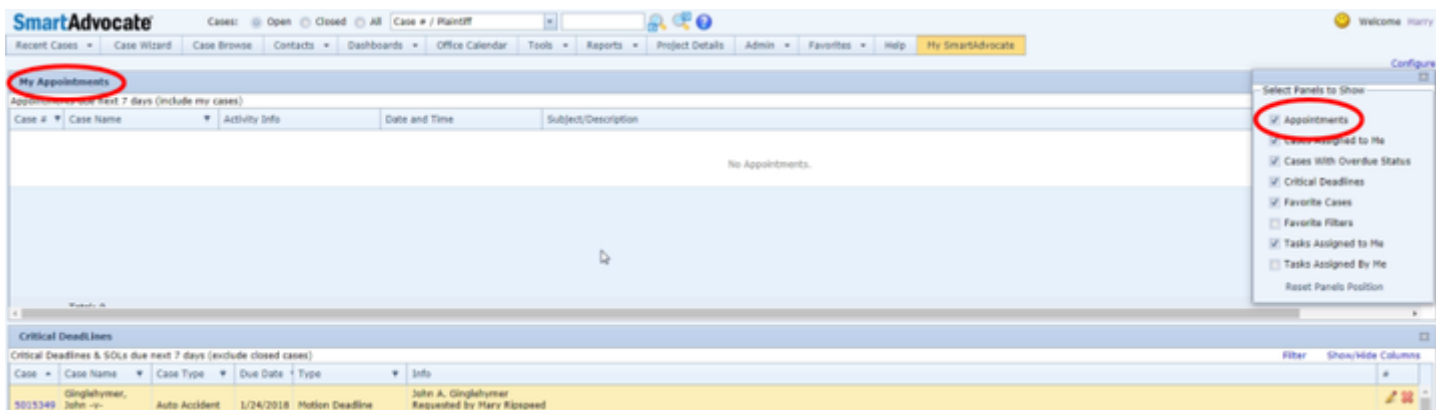
Users who are members of a User Group that has appropriate permissions can view the My SmartAdvocate of others. From your My SmartAdvocate screen, to the left of the Configure link, you will see text indicating that you are currently seeing your own page.



Click on the small down arrow (▾) next to your name and select the individual whose My SmartAdvocate page you want to view. Note that any actions you take while viewing someone else's My SmartAdvocate page will be recorded as having been completed by you, not the person whose page you are viewing.

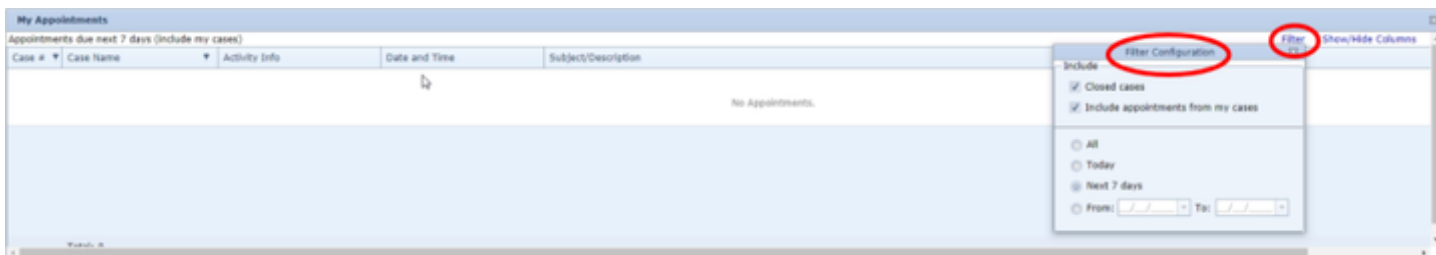
My Appointments

To display the "My Appointments" panel on the My SmartAdvocate Screen, make sure the Appointment option is checked in the personal configuration tab. All your upcoming appointment for all cases will be displayed in the My Appointments panel. Non-case appointments will also be displayed.



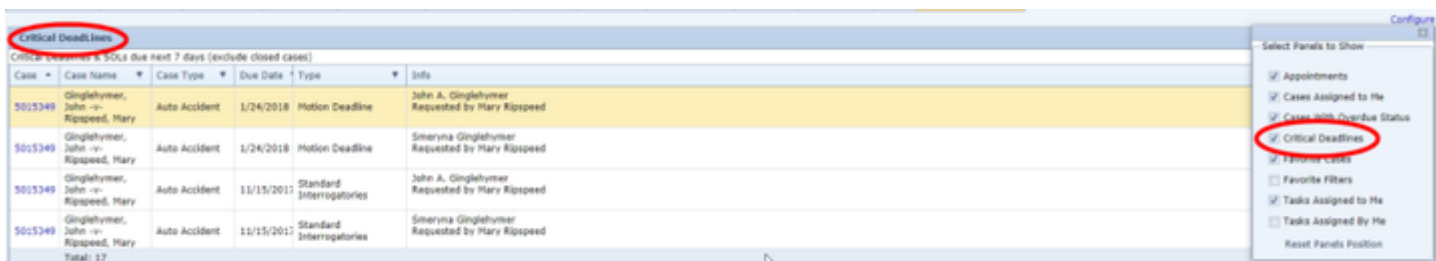
Clicking on the Filter link opens the Filter Configuration panel. Within that panel you can choose which appointments are displayed in the My Appointments panel. The options include:

1. Closed cases: Checking this box will include appointments from closed cases in the panel.
2. Include appointments from my cases: Checking this box will include in the panel all appointments from any case to which you are assigned in any capacity, regardless of whether you are involved with the appointment.
3. The date filter allows you to determine the date range within which appointments will be displayed in the panel.

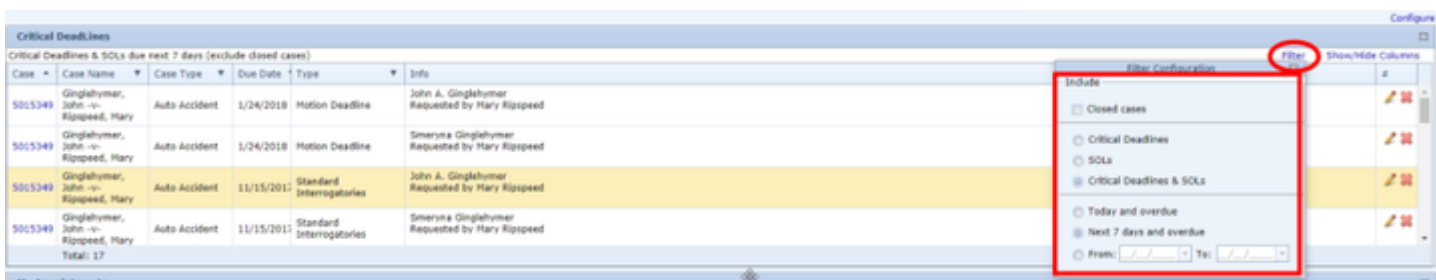


Critical Deadlines

To display the "Critical Deadlines" panel on the My SmartAdvocate Screen, make sure the Critical Deadlines option is checked in the personal configuration tab. All upcoming Critical Deadlines for all cases will be displayed in the panel. This panel displays cases to which you are assigned that have open or past due critical deadlines and/or SOL's.



You can configure the dates to include in the list (i.e., Today and Overdue, Next 7 days, or a custom range). You can also filter to show Critical Deadlines, SOL's or both.



SOL/Critical Deadline Reports

Critical Deadline Report: Lists critical deadlines in a selected date range in a text table. Columns include the case number, name, and type, the party the deadline applies to, the deadline type, due date and compliance date, the attorney and paralegal on the case, and any comments on the deadline. Parameters include the date range, case status (open, closed, or both), case type, whether to include critical deadlines that have been met, the deadline type, the staff member involved with the case, and whether to include mass tort cases. Note: this report does not list SOLs.

No Fault Report: Lists No Fault SOLs due before a selected number of days after the current date (including overdue ones) in a text table. Columns include the case number, name, type and status, insurance carrier, SOL deadline date, the number of days until the deadline date (or, if the deadline is overdue, the number of days past the deadline date), and the attorney, paralegal, and case manager. Parameters include the number of days, the staff member involved with the case, whether to include cases referred out or handled within your firm, and the firm office handling the case.

Notice of Claim Report: Lists Notice of Claim SOLs due in a selected date range in a text table. Columns include the case number and type, plaintiff's name, defendant's name, incident date, SOL deadline, date of compliance, and the attorney, case manager, and paralegal. Parameters include the case status (open, closed, or all), whether to include SOLs that have been met, whether to include mass tort cases, and the date range.

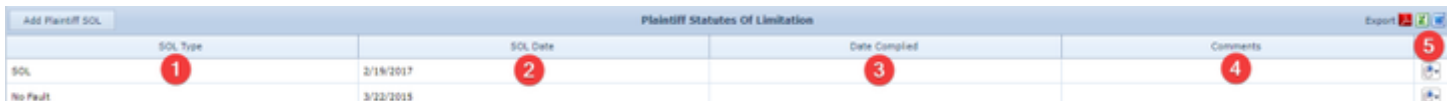
SOL Report: Lists SOLs in a text table. Almost every column is optional, and the selection of columns is one of the parameters. Other parameters include how the SOL deadline date range is selected, the date range itself, the staff involved with the case, the case group and type, whether to include SOLs with compliance or filing dates, whether to include cases referred out or handled within your firm, whether to include cases that have or have not been retained, whether to include mass tort cases, whether to limit the report results to only show the SOL with the earliest deadline date in each case, the SOL Type, and the case status (open, closed, or all). Note that this report can, depending on the SOL types chosen, include the information in the No Fault and Notice of Claim Reports.

Plaintiff Statutes Of Limitation Subtable

The Plaintiff Statutes Of Limitation table contains the details of statutes of limitations that govern actions taken by a particular plaintiff. It contains the same information as the [Plaintiff Statutes of Limitation Table](#) in the [Critical Deadlines](#) case page, but only for a single plaintiff. The Plaintiff Statutes Of Limitation table is a subtable of the [Plaintiffs Table](#), which means that each row of the Plaintiffs table has an individual Plaintiff Statutes Of Limitation subtable associated with it, which is specific to the plaintiff in that row; open a row of the Plaintiffs table using the plus / minus sign icon to reveal the associated Plaintiff Statutes Of Limitation subtable. Each row of the subtable represents an individual statute of limitations. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Plaintiff Statutes Of Limitation table contains the following columns:



| | SOL Type | SOL Date | Date Complied | Comments | |
|----------|----------|-----------|---------------|----------|--|
| SOL | | 2/19/2017 | | | |
| No Fault | | 3/22/2015 | | | |

1. SOL Type: The SOL type.
2. SOL Date: The deadline of the SOL.
3. Date Complied: The date of compliance with the SOL.
4. Comments: Any comments about the statute of limitations.
5. [column with no title]: [Right-click icon](#); the right-click menu contains Edit and Delete

Editing a Plaintiff SOL

To edit a plaintiff-centric statute of limitations:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for plaintiff-centric statutes of limitations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Plaintiff SOL Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Plaintiff SOL

To delete a plaintiff-centric statute of limitations:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the SOL, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Plaintiff SOL

To add a new plaintiff-centric statute of limitations:

1. Click the Add Plaintiff SOL button. This will bring up an Add/Edit panel for plaintiff-centric statutes of limitations, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Plaintiff SOL Panel](#) for details about the fields.
3. Click Save to save the SOL and close the panel.
 - If you decide you do not wish to save the SOL, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Plaintiff SOL Panel

The Add/Edit Plaintiff SOL Panel allows you to fill in the details of a plaintiff-centric statute of limitations. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Plaintiff SOL

Plaintiff Name:* Robinson, A. Seth **1**

SOL Type:* No Fault(0 0 30) **2**

From Date: 02/20/ **3** Pick From Date **4**

SOL Date:* /2015 **5**

Date Complied: 03/02/2 **6**

Comments: **7**


Created at 3/30/2018 11:31:00 AM by Dreier, Harry.


Save Cancel

1. Plaintiff Name: The plaintiff to whom the statute of limitations applies.
2. SOL Type: The SOL type (including its length).
3. From Date [any date]: The date from which the SOL begins to be counted.
4. Pick From Date: Provides various dates from the case that could be the From Date for purposes of calculating the SOL. Clicking on one of the dates inserts that date into the From Date field.
5. SOL Date: The deadline of the SOL.
6. Date Complied: The date of compliance with the SOL.
7. Comments: Any comments about the statute of limitations.

My Filters

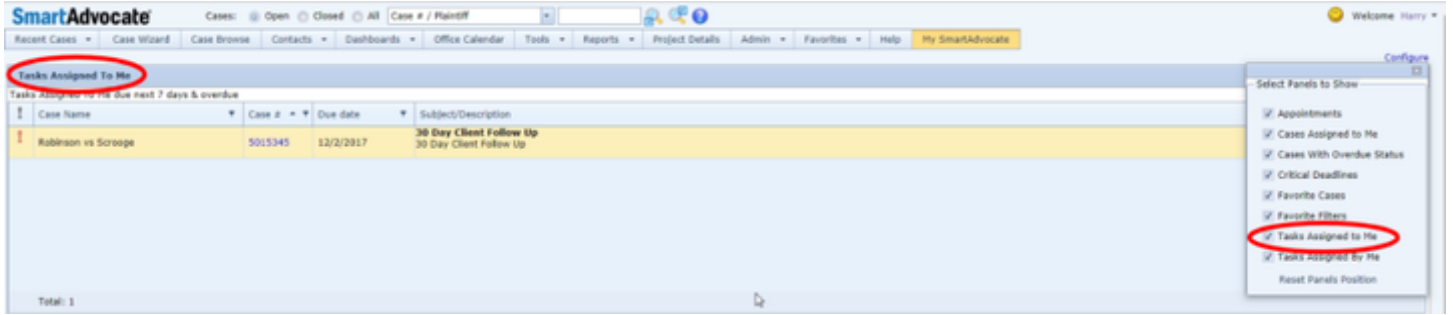
The My Filters panel contains a list of all of the Case Browse and [Calendar](#) filters you have saved as favorites. These filters are also among the ones that appear in the Favorites menu in the Top Tool Bar. The filters are listed in a table with the following columns:

- Name: The name of the filter. Clicking the name will automatically open the Case Browse or Office Calendar page with the filter applied.
- Criteria: The set of selections that make up the filter.
- Actions: Contains only a single icon () for deleting the filter. Clicking the icon will bring up a confirmation message to avoid accidental deletion; click Yes to confirm the deletion.

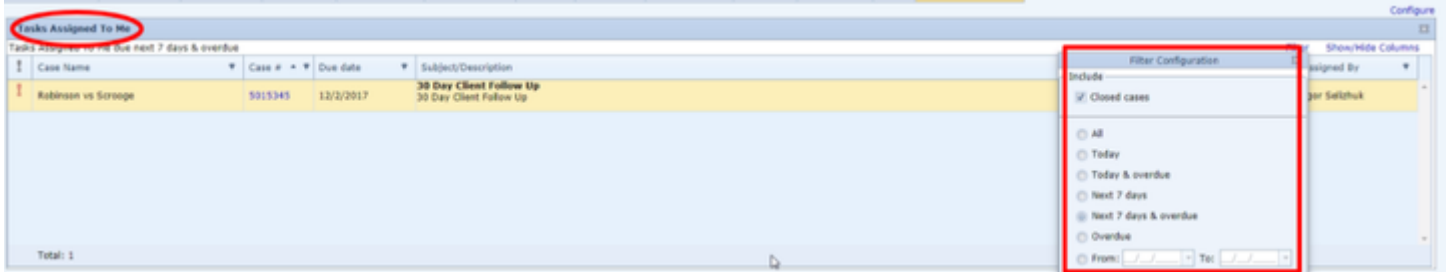
| My Filters | | |
|-----------------------------------|---|---|
| Name | Criteria | Actions |
| My Auto Neg cases | IsCaseClosed:Not Closed; IsCaseRetained:All; IsCaseSettled:All; CaseGroup:Auto Accidents; Staff:Dreier, Harry; MassTort:All Non Mass Tort; |  |
| | From today to today+118 days Case staff: All Case type: All Case status: All Office: | |
| Total: 3 | | |

Tasks Assigned to Me

Lists the Tasks that have been assigned to you (either those you assigned to yourself, or those assigned to you by others).

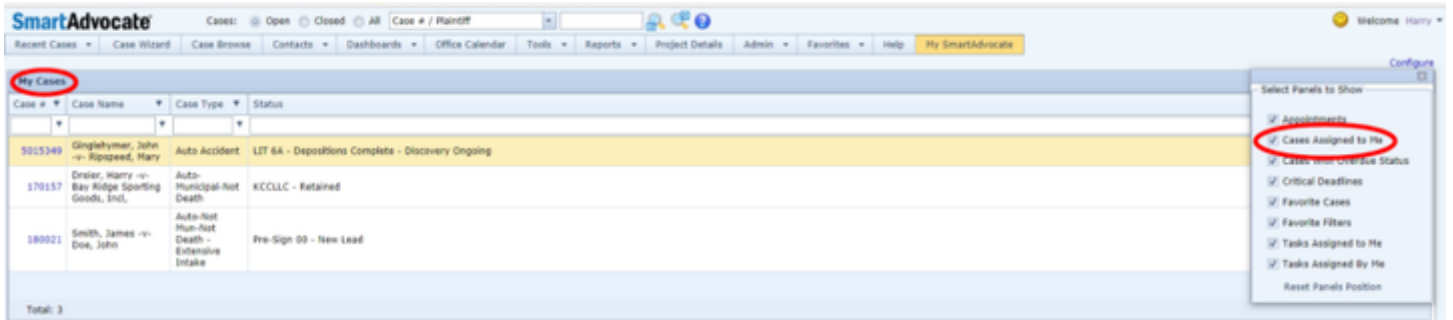


You can configure which Tasks you want listed in the panel by configuring the filters.



My Cases (Cases Assigned to Me)

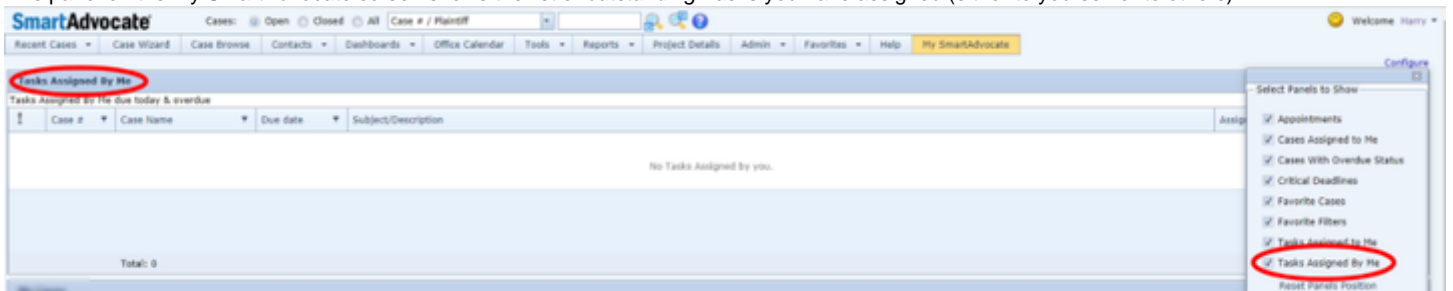
My Cases shows the cases to which you have been assigned. (See also Admin, Users, Firm Role and Title.)



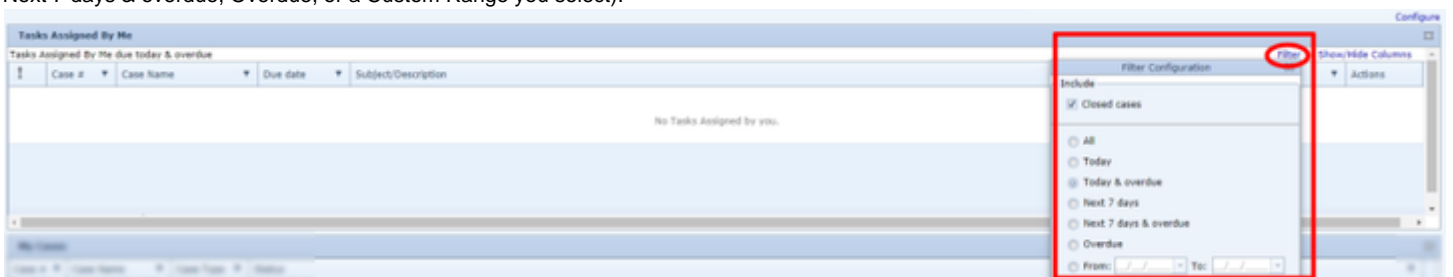
There are no additional filtering options for the My Cases panel.

Tasks Assigned By Me

This panel on the My SmartAdvocate screen shows the list of *outstanding* Tasks you have assigned (either to yourself or to others).

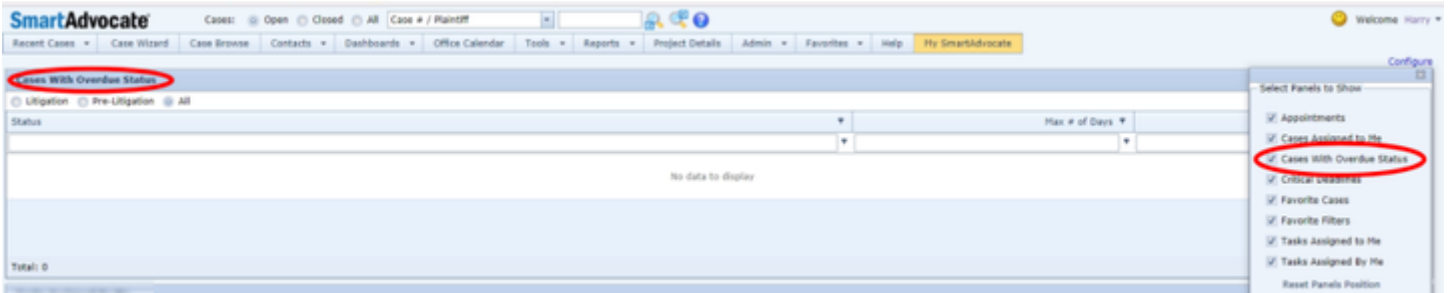


You can configure the Filter within this panel to show the Tasks you want to see based on their due dates (All, Today, Today & Overdue, Next 7 days, Next 7 days & overdue, Overdue, or a Custom Range you select).



Cases with Overdue Status

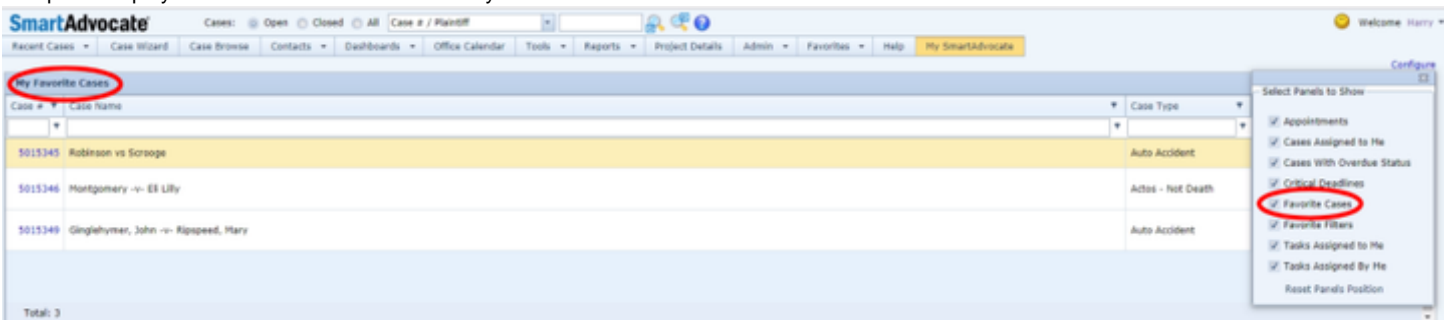
This panel displays your cases that have items that are overdue.
(See also Dashboards-Overdue Dashboards, Tasks)




Radio buttons permit you to choose whether to view those cases in the Litigation stage, Pre-Litigation stage, or both. There are no additional filtering options for the Cases with Overdue Status panel.

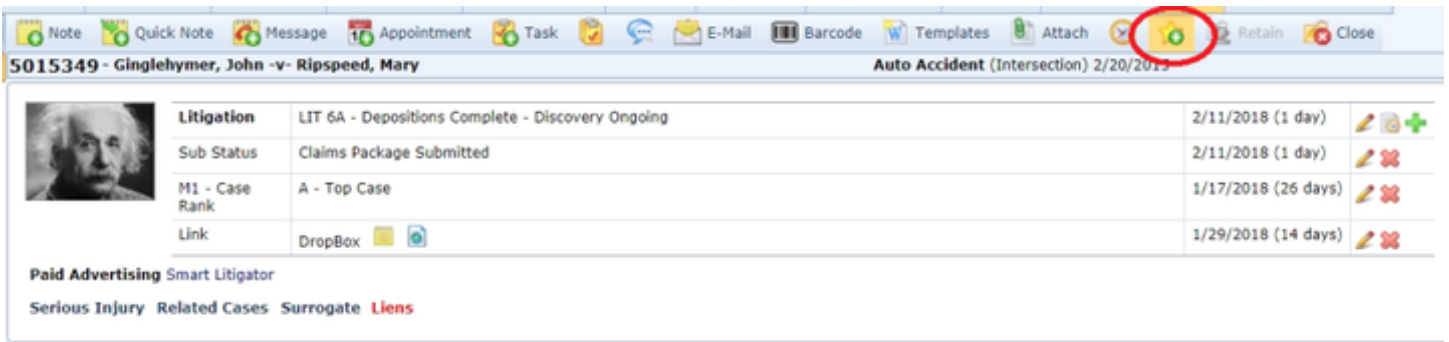
My Favorite Cases

This panel displays cases that have been added to your "Favorites" list.



To have cases listed in the "My Favorite Cases" panel, they must first be added to your "Favorites" list. There are two methods to add a case to your "Favorites" list.

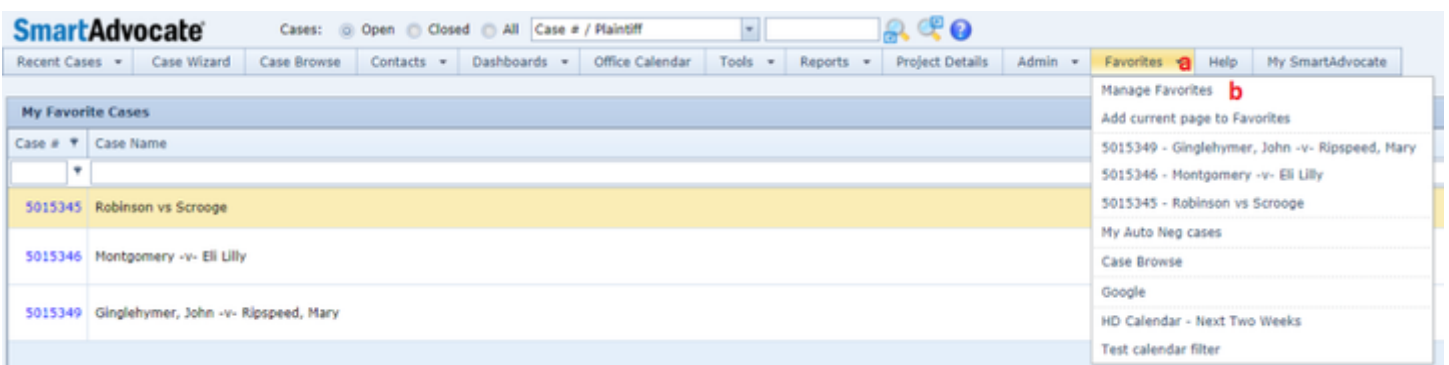
1. From within a case, click on the Add to Favorites button () in the Quick Action Toolbar. Clicking on the Add to Favorites button in a case that has already been added to your "Favorites" list will remove the case from the list.



1. From any page in SmartAdvocate on which the Top Tool Bar is visible:

(TIP: When using this method, it is a good idea to make a note of the Case Number(s) of the case(s) you want to add before you start the process)

1. Click "Favorites" on the Top Tool Bar.
2. Click "Manage Favorites" from the pull-down menu



1. Make sure the "Cases" tab is selected.
2. Click the "New Case" tab
3. Enter the Case Number for the case you want to add to Favorites
4. Click "Update" to save and update the information

The screenshot shows the 'Favorites Setup' interface. At the top, there are tabs for 'Cases', 'Filters', 'SmartAdvocate Pages', 'External Links', and 'Calendar Filters'. Below this is a 'New Case' button and a table of cases. The table has columns for Case No., Case Name, Case Type, Status, and Actions. An 'Edit Form' dialog box is open in the foreground, with a text input field for 'Case No.' and 'Save' and 'Cancel' buttons.

1. The cases that have been added to your Favorites list will be displayed in the 'My Favorite Cases' panel

The screenshot shows the 'My Favorite Cases' panel. It contains a table with columns for Case No., Case Name, Case Type, Status, and Actions. The first three rows are highlighted in yellow and enclosed in a red rectangular box. The cases are: 5015343 Robinson vs Scrooge (Auto Accident, LIT 3F - S/C filed but not served), 5015346 Montgomery -> El Lily (Actes - Not Death, LIT 6 - Depositions and Other Discovery Ongoing), and 5015349 Ginglehymmer, John -> Ripapred, Mary (Auto Accident, LIT 6A - Depositions Complete - Discovery Ongoing).

Case Pages

Case pages in SmartAdvocate provide all of the case related information available in the system. See Quick Case Search and Case Browse for additional information about locating and opening a specific case. Case pages are divided into six distinct areas: General, Plaintiff, Defendant, Litigation, Surrogate, and Other. Each area is further divided into distinct sections or pages. The pages that are generally available by default will be discussed in this manual. However, you should be aware that additional pages may be available and added for each area, and pages that are available can be removed if they are not relevant to your firm's practice. The pages can be set by default, and then added or removed for each Case Group. See Admin > Case Menu Configurator for details on adding or removing these sections.

General

The Case Summary page is an essential resource for managing and keeping track of case information and deadlines. Important information from various aspects of the case is collected and centralized in a single page, allowing you to get a basic view of the entire case at a glance. This page is also where the case's status, staffing, and upcoming events can be edited, making it vital for case management. The information in the case summary is divided into eleven areas. These areas are the basic case data area, Staff, Last Notes, Pending Appointments, Tasks, Courts / Dockets, Pending Critical Deadlines, Plaintiffs, Defendants, Negotiations and Settlements, and an area for miscellaneous tabs.

The basic case data area

This area is for the fundamental information about the case, including status, key dates, location, and referral information.

The screenshot shows the 'Basic Case Data' area for case 5015349. It includes a header with the case number, name, type, date, and attorney. Below this is a table with columns for Litigation, Sub Status, M1 - Case Rank, Link, Incident Date, Open, Wanted/Accepted Date, Retainer Date, Expected Resolution, Next Deadline, Case State, Office, Estimated Value, Liability Coverage/Code, Total Settlement, and Next SOL. A 'Paid Advertising Smart Litigator' banner is also visible.

The status table


| | | | |
|-------------------|---|---------------------|--|
| Litigation | LIT 6A - Depositions Complete - Discovery Ongoing | 2/11/2018 (1 day) | |
| Sub Status | Claims Package Submitted | 2/11/2018 (1 day) | |
| M1 - Case Rank | A - Top Case | 1/17/2018 (26 days) | |
| Link | DropBox | 1/29/2018 (14 days) | |

This area includes a table without headings that contains all of a case's statuses. The table has four columns. The first contains the stage (for the primary status; this is in bold text) or the status type (for sub-statuses). The second contains the status description. The third contains the date on which

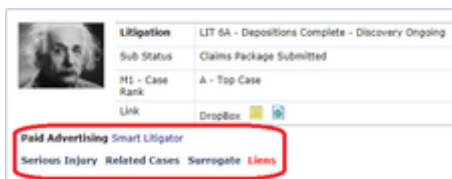
the current status began, and the number of days since then (in parentheses). The fourth is an action column containing an [Edit icon](#), [History icon](#), and [Add icon](#) (for the primary status) or just an [Edit icon](#) and a [Delete icon](#) (for sub-statuses). The add/edit form for the status table has the following fields:

- **Status Type:** A dropdown containing all status types. (See [Status Setup](#) or the [Case Status Types](#) picklist for information on editing status types.)
- **Status Description:** A dropdown. Only becomes active if Status Type is set, and the contents of the dropdown will be the status descriptions of the selected type. (See [Status Setup](#) or the [Case Statuses](#) picklist for information about editing status descriptions.)
- **Close Reason:** A dropdown. Available only if Status Description is set to Closed Case, and is inactive if Status Description is not set at all. The contents of the dropdown are all case close reasons. (See the [Case Close Reasons](#) picklist to edit case close reasons.)
- **Expected # of Days:** A numeric input field. When Status Description is set, defaults to the expected number of days for that status description, but can be edited if appropriate. (See [Status Setup](#) to edit the expected number of days for status descriptions.)
- **Date:** A date-widget dropdown used to set the date the status began. Set to today by default but can be edited to dates in the future or past (selecting a past date, in particular, may be useful if you forgot to change the case status in SmartAdvocate on a day that actual case events should have prompted a status change).
- **Comments:** A text input field. Used for any comments regarding the status change.

There is also a button above the input field for comments labeled Clear Comments; clicking it will delete anything currently entered in the comment field.

Clicking the history icon () will open a panel with a table that contains all the statuses the case has been through in its history. The table's columns are Status Type, Status (i.e. status description), From Date (the date the status began), To Date (the date the status ended), Staff (the staff member who assigned the status to the case), and Comments (any comments that were added in the comments field when changing the status). If the status is changed to Closed Case, the Comments column for that row will include an auto-generated comment with the reason for the case closure.

Referral & case flags



Below the status table are up to two lines of text and/or icons. The first line contains the referral information for the case. The form of incoming referral is listed, followed by the contact providing that referral (clicking the name of the contact opens the contact card in a new tab). If applicable, the form of outgoing referral is then also listed, followed by the contact to which the case was referred (again, clicking the name opens the contact card). The second, if it is present, is a series of short phrases or icons (called "flags") indicating characteristics of the case that may affect how the case is or should be handled. Flags may include things like "Serious Injury" or "Bankruptcy." Clicking any of the flags will take you to the page or miscellaneous tab containing more details about that flag (for example, clicking Referred Out takes you to the [Retainer/Referral](#) page). These flags are automatically generated by the SmartAdvocate system based on the case information; they cannot be manually added to, edited, or deleted by users (although they can be edited by the firm's Admin under Admin > Picklist Maintenance > Case Summary Flags).

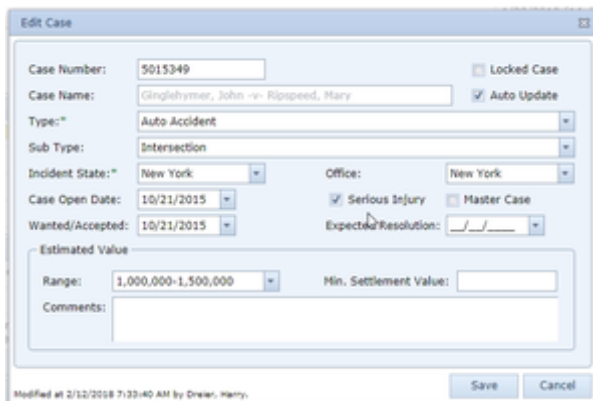
Key dates

| | | | |
|----------------------|------------|-------------------------|-------------|
| Incident Date | 2/20/2015 | Case State | New York |
| Open | 10/21/2015 | Office | New York |
| Wanted/Accepted Date | 10/21/2015 | Estimated Value | \$1M-\$1.5M |
| Retainer Date | 10/21/2015 | Liability Coverage/Code | \$500,000 / |
| Expected Resolution | | Total Settlement | \$4,602,500 |
| Next Deadline | 11/15/2017 | Next SOL | |

To the right of the status table are two columns. The first column contains a list of significant case dates. From top to bottom, the dates are the date of the incident, the date the case was opened, the date the case was marked "wanted" by your firm, the date the retainer was signed, the date the case is expected to be resolved, and the date of the next critical deadline or SOL. Note: If there is an outstanding critical deadline or SOL due on a past date, then Next Deadline/SOL will contain the earliest date of all outstanding critical deadlines and SOLs, and the text of the date will be red.

The second column contains other significant information. From top to bottom, the column contains the state in which the case takes place, which of your offices is handling the case, the estimated value range of the case, the *total* liability coverage of the defendants, and the *total* value of all settlements obtained in the case, and a liability code/proportion (if applicable), which is set in the [Incident](#) page. Clicking the contents of Estimated Value will bring up a panel with a table that contains all the estimated case values the case has been through in its history.

Edit Case



In the lower right corner of the basic case data area is a button labeled Edit Case. Clicking it brings up the edit case panel. From here, you can change the case type, case subtype, the state in which the case takes place, which office is handling the case, whether the case involves a serious injury, whether the case is a master case in multi-district litigation, the date the case was marked "wanted," the date the case is expected to be resolved, the estimated value range of the case, the minimum amount your client is willing to accept in settlement, and any comments regarding the estimated value of

the case. There is also a field for the date the case was opened. If permitted in the Case section of Administrator Parameters Setup (Internal), both the Case Name and the Case Number can be edited. Note: The estimated value range is selected from a dropdown. See the [Case Values](#) picklist to set the available case values.

Staff

| Staff | | |
|--------------|-----------------|-----------------|
| Attorney | Ramadan, Schery | [Edit] [Delete] |
| Paralegal | Dreier, Harry | [Edit] [Delete] |
| Paralegal | Rankin, Judy | [Edit] [Delete] |
| Case Manager | Smith, Anthony | [Edit] [Delete] |

This area contains a table without headings that lists the staff members assigned to the case. The table has three columns. The first column contains the case role of the staff member. The second contains the name of the staff member; clicking the name opens the staff member's contact card in a new tab. The third is an action column containing an edit icon and a delete icon.

You can add a staff member by clicking Add in the upper right of the Staff area. The add/edit form has fields for the staff member's name, case role, and any comments regarding the addition or change of the staff member. You can click Show History in the upper right of the Staff area to bring up a panel with a table that contains all the staff members that have been assigned to the case through its history.

Last Notes

| Last Notes | | |
|--|---------------------------|-----------------|
| File Location - 2/12/2018 12:31 PM by Simpson, Claude | File to Claude | [Edit] [Delete] |
| Medical Records - 2/11/2018 12:00 PM by Simpson, Claude | Order all medical records | [Edit] [Delete] |
| Adjuster Plaintiff - 2/11/2018 11:59 AM by Simpson, Claude | Adjuster note | [Edit] [Delete] |

This area contains a table without headings that lists the five most recent notes on the case. The table has two columns. The first consists of a line with the note's type, date, time, and creator, followed by the note itself. The second is an action column containing an edit icon and a delete icon. You can add a new note by clicking Add in the upper right of the Last Notes area.

Pending Appointments

| Pending Appointments | | | |
|----------------------|------------------------|--------|--|
| 2/20/2018 | Court Conference - | [Info] | Comment |
| 1/31/2018 | Court Appearance - | [Info] | |
| 1/22/2018 | Pre-Trial Conference - | [Info] | First Pre-Trial Conference. All parties and counsel must attend. |

This area contains a table without headings that lists all upcoming appointments regarding the case, together with any appointments from the past that have not been marked Completed. The table has three columns. The first contains the date of the appointment. The second contains the subject of the appointment, and an Information icon. Clicking the Information icon brings up a small note with a list of the attendees of the appointment. Note: The note says "Attending Staff," but it lists all attendees, even those that are not staff members. You can edit any appointment in this table by double-clicking anywhere in the row containing the appointment you want to edit. The third column contains the text from the Comments section of the appointment. There is no edit icon. There is no button in this area to create a new appointment, but you can use the Add Appointment icon in the Quick Action Toolbar.

Tasks

| Tasks | | | | |
|-----------|-----------------|------------|-----------------|-----------------------------|
| 2/5/2018 | Call back | [Priority] | Bibb, Natalya | [Complete] [Edit] [Perform] |
| 2/20/2018 | Medical Records | [Priority] | Reed, Devhanara | [Complete] [Edit] [Perform] |

This area contains a table without headings that lists all incomplete tasks regarding the case. The table has five columns. The first contains the priority icon for the task. (🔴 = Critical; 🟡 = High; 🟩 = Low; if the column is blank, the item has been assigned a priority of Normal, which is the default.) The second contains the due date of the task. The third contains the subject of the task, and an Information icon. Clicking the information icon brings up a small note with the description of the task. The fourth column contains the name of the staff member to whom the task is assigned. The fifth is an action column containing a mark-complete icon, an Edit icon, and if applicable, a perform-task icon. You can add a new task by clicking Add in the upper right of the Tasks area.

Courts/Dockets

| Courts / Dockets | | |
|---------------------------------|------------------------|--|
| New York County Clerk | | |
| SUPREME COURT - NEW YORK COUNTY | 32658/2016 (5/10/2016) | Courtroom Clerk: Chrein, Simon Judge: Scaterico, Judy-Ann |

This area contains a table without headings that lists all the courts that are hearing or have heard the case and the dockets for each court. The table has three columns. The first contains the name of the court; clicking the name opens the court's contact card in a new tab. The second contains the docket the case is on, as well as the filing date for that docket. The third contains all the court personnel working on the docket; each court employee is listed with their role preceding their name, and clicking their name opens their contact card in a new tab. You cannot directly change or add to the contents of this table; you must go to the [Court](#) page to make any changes that would appear here.

Pending Critical Deadlines

| Pending Critical Deadlines | | | Add Defendant SOL Add Plaintiff SOL Add Critical Deadline |
|----------------------------|--------------------------|------------|---|
| Gingelhymer, John A. | Standard Interrogatories | 11/15/2017 | |
| Gingelhymer, Smeryna | Standard Interrogatories | 11/15/2017 | |
| Gingelhymer, John A. | Motion Deadline | 1/24/2018 | |
| Gingelhymer, Smeryna | Motion Deadline | 1/24/2018 | |

This area contains a table without headings that lists all the outstanding critical deadlines and SOLs for the case. The table has four columns. The first contains the name of the party to whom the deadline or SOL applies. The second contains the type of critical deadline or SOL; clicking the text in this column will take you to the [Critical Deadlines](#) page. The third column contains the due date of the deadline. The fourth contains any comments regarding the deadline. You cannot directly edit the contents of this table; you can, however, add a Defendant SOL, Plaintiff SOL, or critical deadline by clicking on the appropriate link in the upper right portion of the panel.

Plaintiffs

| Plaintiff | # | Primary | Role | Phone # | Insurance Co. | Adjuster | Coverage | Law Firm |
|--------------------------------|---|-------------------|--------------------|----------------|---|----------------------|-----------|----------|
| Gingelhymer, John A. (English) | 1 | Plaintiff/Contact | (P)-Owner/Operator | (516) 555-1212 | State Farm Insurance (No Fault Primary) Claim #: JG20150120 No Fault Policy Limits: \$100,000 / \$500,000 UM/SUM Limits: \$50,000 / \$100,000 | Pentahgrass, Gichele | \$300,000 | |
| Gingelhymer, Smeryna (D) | 1 | | (P)-Passenger | | | | | |

This area contains a table that lists all the plaintiffs in the case. The table's columns are:

- **Plaintiff:** The name of the plaintiff; the text of the name is also a link to the plaintiff's [Contact Card](#). If the plaintiff has a nickname, it will be listed in italics after the actual name and included in the link. If languages are listed on the plaintiff's contact card, they will be listed to the right of or below the link in parentheses.
- **#:** Indicates the Group into which this plaintiff has been placed. The Group is set when the contact is added as a Plaintiff and can be edited by editing the Plaintiff Summary (but NOT the Contact Card).
- **Primary:** Contains "Plaintiff" if the plaintiff is the primary plaintiff, "Contact" if the plaintiff is the primary contact, or "Plaintiff/Contact" if the plaintiff is both. Blank otherwise.
- **Role:** The role of the plaintiff in the incident.
- **Phone #:** The primary phone number of the plaintiff.
- **Insurance Co.:** The insurance company, claim number, and policy limits (No-Fault and UM/SUM) of the plaintiff's insurance. The insurance company's name is a contact-card link.
- **Adjuster:** A contact-card link for the insurance adjuster for the plaintiff's insurance and, if available, the adjuster's phone number.
- **Coverage:** The amount of the plaintiff's available insurance coverage.
- **Law Firm:** Contact card links for the law firm and primary attorney representing your client in the same or a related matter, but in a different capacity.

You cannot directly change the contents of this table; you must go to the [Plaintiff Summary](#) or [Plaintiff Insurance](#) page to make any changes that would appear here.

Defendants

| Defendant | # | Role | Insurance Co. | Adjuster | Coverage | Law Firm |
|----------------|---|--------------------|---|----------------------------|-----------|--|
| Rippreed, Mary | | (D)-Owner/Operator | GEICO (Collision) Claim #: G65435354 Limits: \$100,000 / \$300,000 | Kramer, John(908) 855-4678 | \$300,000 | Castle & Alamos, LLP Arcana, Gharik |

This area contains a table that lists all the defendants in the case. The table's columns are:

1. **Defendant:** The name of the defendant; the text of the name is also a link to the defendant's [Contact Card](#). If the defendant has a nickname, it will be listed in italics after the actual name and included in the link.
2. **#:** Indicates the Group into which this defendant has been placed. The Group is set when the contact is added as a defendant and can be edited by editing the Defendant Summary (but NOT the Contact Card).
3. **Role:** The role of the defendant in the incident.
4. **Insurance Co.:** The insurance company, claim number, and policy limits of the defendant's insurance. The text of the insurance company's name is a contact-card link.
5. **Adjuster:** A contact-card link for the insurance adjuster for the defendant's insurance.
6. **Coverage:** The amount of the defendant's available insurance coverage
7. **Law Firm:** Contact-card links for the law firm and the primary attorney representing the defendant.

You cannot directly change the contents of this table; you must go to the [Defendant Summary](#), [Defendant Attorneys](#), or [Defendant Insurance](#) page to make any changes that would appear here.

Negotiations and Settlements

| Plaintiff | Case Value | Last Demand | Last Offer | Total Liens | Settlement | Liability Coverage |
|--------------------------|-------------|------------------------|------------------------|-------------|--|--------------------|
| Gingelhymer, John A. | \$34-\$1.5M | \$950,000 (3/3/2018) | \$200,000 (5/3/2018) | \$1,750 | \$200,000 (4/30/2018), \$750,000 (3/3/2018), \$1,000,000 (3/10/2018) | \$900,000 |
| Gingelhymer, Smeryna (D) | \$34-\$1.5M | \$750,000 (3/5/2018) | \$250,000 (5/5/2018) | \$0 | \$1,000,000 (5/10/2018) | \$0 |
| Marks, Rodney (D) | \$34-\$1.5M | \$750,000 (12/19/2017) | \$250,000 (12/19/2017) | \$0 | \$1,000,000 (5/10/2018) | \$300,000 |
| Marks, Jenny (I) | \$34-\$1.5M | \$750,000 (12/19/2017) | \$250,000 (12/19/2017) | \$0 | \$1,000,000 (5/10/2018) | \$0 |

This area contains a table that lists all the plaintiffs in the case and provides negotiation, settlement, and other monetary information for each. The table's columns are:

- **Plaintiff:** The name of the plaintiff on whose behalf negotiations and settlements were made.
- **Case Value:** The estimated value range of the case. Set in the basic case data area, above. Identical for all plaintiffs in the case.
- **Last Demand:** The most recent demand made on the plaintiff's behalf in the case, and the date of the demand. Set in the [Negotiation/Settlement](#) page.
- **Last Offer:** The most recent offer received on the plaintiff's behalf in the case, and the date of the offer. Set in the [Negotiation/Settlement](#) page.
- **Total Liens:** The total of all negotiated/final liens on the plaintiff in the case. Set in the [Lien Tracking](#) page.
- **Settlement:** The most recent settlement reached on the plaintiff's behalf in the case, and the date of the settlement. Set in the [Negotiation/Settlement](#) page.
- **Liability coverage:** The total coverage provided by all insurance held by the plaintiff. Set in the [Plaintiff Insurance](#) page.

This area contains information about various aspects of the case not covered by the other areas of the Case Summary page. The area is divided into eight tabs, the contents of only one of which is visible at a time; click the heading of the tab you want to access to bring up that tab's information. Each tab's heading includes a small indicator circle next to the title of the tab. If the indicator circle is white, there is no information in that tab (i.e., the tab is not relevant to the case or the relevant information has not yet been added). If the circle is green, there is some information in the tab. The eight tabs are Incident Facts, Injuries, Liens, Other Cases, Surrogate, Bankruptcy, Related Cases, and Other Plaintiffs.



Incident Facts

This tab displays the contents of the Facts field in Incident. Note: The heading for Incident Facts will always have a green indicator circle, even in the Facts field in Incident is blank.

Injuries

This tab contains a table listing all the summaries in the [Injuries](#) page. The table is essentially identical to the table in the Injuries page, except that there is no action column or way of editing the table directly, and the first column is labeled Plaintiff Name instead of Plaintiff and cannot be expanded to reveal injury details. In fact, the injury details are not visible at all in this tab, except insofar as they are included in the injuries summary or pleadings summary.

Liens

This tab contains a table with the total liens on each plaintiff in the case. The table is identical to the Totals table in the [Lien Tracking](#) page. Note: This table is present even if the heading for Liens has a white indicator circle, but all of the columns besides Plaintiffs will contain "\$0.00" for each plaintiff and the total.

Other Cases

This tab contains a table listing all other cases in the SmartAdvocate system that share at least one plaintiff with this case. This is useful if you have multiple cases on a plaintiff's behalf stemming from distinct but related incidents; in each case, this tab will contain a link to the other case or cases. The table has columns for the case number, case name, current primary status, attorney, paralegal, and case manager. Clicking the case number will open the case summary page for that case in a new tab. This table is similar to the one in the [Other Cases](#) page, except that it ignores cases that have not been assigned case numbers and the columns are slightly different. Neither table can be directly edited; both are automatically generated based on the other cases in the SmartAdvocate system.

Surrogate

This tab contains a table listing all deceased plaintiffs in the case. The table has columns for the decedent's name, date of death, and location of death. The information in this tab is taken from the [Decedent Information](#) page and cannot be edited from this tab.

Bankruptcy

This tab contains a table listing all bankruptcies experienced by the parties in the case. The table has columns for the party type that experienced the bankruptcy (either "P" for plaintiff or "D" for defendant), the bankruptcy court, judge, docket number, trustee and trustee's attorney, and the date the attorney was retained by the trustee.

Related Cases

This tab is the only one of the miscellaneous tabs that does not draw its information from elsewhere in the case pages. It is used to mark other cases as somehow related to this one. Unlike Other Cases, which is automatically populated specifically with cases that share a plaintiff, marking a case related is a manual process, and therefore your firm can decide when and whether it is useful to mark two cases related. (Possible uses for the feature include linking cases with similar fact patterns, linking med mal cases that occurred in the same hospital, etc.) The tab contains a table listing all cases that have been marked as related to this one. The table has columns for the case number, case name, current primary status, attorney, paralegal, and case manager, and an action column with a delete icon for removing the relation. To mark a case related, click the Add Related Case button above the table, which will bring up a dropdown containing all the cases in the SmartAdvocate system. Select the case you wish to link to this one, then click Ok. The case you selected will appear in the current case's Related Case list, and the current case will *also* automatically appear in the selected case's Related Case list.

Other Plaintiffs

This tab contains a table listing all plaintiffs in the case that are not represented by your firm. The table is identical to the Other Plaintiffs table in the [Plaintiff Summary](#) page (although the positions of the action icons are switched). Adding, editing, or deleting "other" plaintiffs works the same in this tab as it does in the Plaintiff Summary page and any information added, edited, or deleted in this tab will have the same effect in the Other Plaintiffs table in the Plaintiff Summary page.

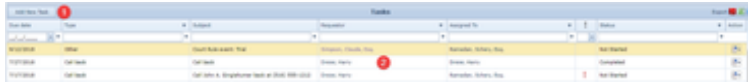
Social Security Disability

The Social Security Disability page of a case provides information regarding any Social Security Disability application that may have been filed on behalf of a plaintiff. It is intended to be used by the firm who is representing the plaintiff in connection with the application for Social Security Disability and may be hidden for other firms. If your firm does not represent plaintiffs in that capacity and this page is visible, it can be hidden for some or all Case Groups in Admin > Case Menu Configurator. The page, if hidden, can be made visible in the same manner.

Tasks

The Tasks page allows you to view and record the details of all tasks that have been entered in the case.

The Structure of This Page



1. Add New Task button. Used to add a new task to the case file. See Adding a Task.
2. Tasks table. Contains the tasks details and allows various actions to be performed on them. See Tasks Table.

Tasks Table

The Tasks table is where the details of tasks are stored. Each row of the table represents an individual task. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Tasks table contains the following available columns:

A screenshot of the 'Tasks' table with numbered callouts 1 through 8. The table has columns: Due date, Type, Subject, Description, Requestor, Assigned To, Status, and Action. Red circles with numbers 1 through 8 are overlaid on the interface: 1 points to the Due date column, 2 to the Type column, 3 to the Subject column, 4 to the Description column, 5 to the Requestor column, 6 to the Assigned To column, 7 to the Status column, and 8 to the Action column.

1. Due Date: The date by which the task is scheduled to be completed.
2. Type: The type of the task.
3. Subject: The subject of the task.
4. Description: Any description entered on the task.
5. Requestor: The name of the staff member who requested that the task be completed.
6. Assigned To: The staff member to whom the task is assigned for completion.
7. Status: The status of the task.
8. Action: A [Right-click icon](#); the right-click menu contains Edit and History.

Editing a Task

To edit a task:

1. Click the [right-click icon](#) in the Action column of the row representing the task you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the task you wish to edit. This will bring up an Add/Edit panel for tasks, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tasks, with the existing information filled in.
3. Fill the fields in with your desired information. See The Add/Edit Tasks Panel for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Task

To delete a task:

1. Click the [right-click icon](#) in the Action column of the row representing the task you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the task you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the task, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Task

To add a new task:

1. Click the Add New Task button. This will bring up an Add/Edit panel for tasks, blank except for defaults.
2. Fill the fields in with your desired information. See The Add/Edit Task Panel for details about the fields.
3. Click Save to save the task and close the panel.
 - If you decide you do not wish to save the task, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Task Panel

The Add/Edit Task Panel allows you to fill in the details of a task and contains the following fields:

The screenshot shows the 'Edit Task' panel with the following fields and callouts:

- 1: Task Template Group dropdown
- 2: Task Template Group dropdown
- 3: Select Template dropdown
- 4: Task Category dropdown
- 5: Priority dropdown
- 6: Status dropdown
- 7: Subject text field
- 8: Start Date dropdown
- 9: Time Spent dropdown
- 10: Due Date dropdown
- 11: Days from start date dropdown
- 12: Description text area
- 13: Task Requestor dropdown
- 14: Send Email [Requestor] checkbox
- 15: Assigned To dropdown
- 16: Send Email [Assigned To] checkbox
- 17: CC To dropdown

1. Task Template: Allows you to select a Task Template or Task Template Group for the task.
2. Task Template Group: Allows you to select a Task Template Group for the template.
3. Select Template: Allows you to select a Task Template for the template.
4. Task Category: The category assigned to the task.
5. Priority: The priority of the task.
6. Status: The current status of the task.
7. Subject: The subject of the task.
8. Start Date: The date the task is to be started (typically the date the task was created).
9. Time Spent: The amount of time spent completing the task.
10. Due Date: The date by which the task must be completed.
11. Days from start date: The number of days from the start date until the due date, during which the task must be completed. This number is automatically calculated based upon the start and due dates entered. If this number is changed, the due date will be changed to reflect the number of days entered from the start date.
12. Description: Any description of the task.
13. Task Requestor: The individual who requested that the task be completed. By default, the requestor will be the staff member who created the task.
14. Send Email [Requestor]: Whether to send an email to the Task Requestor upon creation or editing of the task.
15. Assigned To: The individual to whom the task has been assigned. By default, the task will be assigned to the staff member who created it.
16. Send Email [Assigned To]: Whether to send an email to the staff member to whom the task has been assigned upon creation or editing of the task.
17. CC To: Any staff members to whom you want emails sent upon creation or editing of the task.

Notes

The Notes page contains all of the case's notes. There are three main areas in this page: a series of links to each of the note types matching at least one note in that case, a preview pane showing the content of the selected note (when activated), and most importantly, the table of notes itself.

Note Types Links

This area is intended to make filtering the table of notes by type simpler. Every note type with at least one corresponding note in the table is presented as a hypertext link, and the number of notes corresponding to that note type is listed in parentheses right after the name of the type. (The first item in this area is always All Notes.) Clicking the text of any note type will automatically change the filter on the table of notes to only include notes exactly matching that type.

All Notes (181) Adjuster (6) Adjuster Plaintiff (2) Appointments (57) Attorney Note (1) Case (4) Court (1) Critical Comments (2) Defendant Insurance (1) Deposition (1) Discovery (2) eMail (4) Expert (1) File Location (1) General Comments (4) Incoming Text Message (1) Investigations (26) Legal Research (1) Medical Records (15) Negotiation (3) Other (1) Outgoing Text Message (2) Payment received (2) Plaintiff - Contacted (10) Plaintiff - Left Electronic Message for Plaintiff (4) Settlement (1) Task (26)

Preview Pane

This area allows you to view the entire contents of a note, with full formatting. If your case notes tend to be relatively brief and free of formatting, the preview pane is not especially important. You can change the relative size of the preview pane and the table of notes by dragging the border between them to a point of your choosing, so if you do not need the preview pane, you can eliminate it. However, if your case notes tend to be longer and more detailed, with formatting like bullet-point lists (or if you have attached long emails to your case notes), you may find it useful to use the preview pane to view selected notes, rather than showing them in their entirety in the table of notes (which may lead to some rows being very vertically overstretched). See the Compact Note column, below, for a column that shows some of the text of a note without excessive row-stretching.

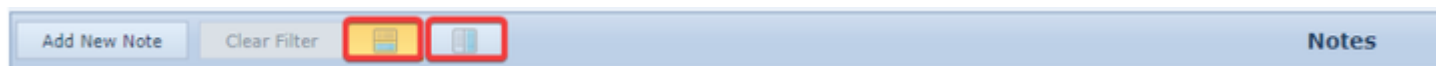
The screenshot shows the preview pane with the following content:

12/12/2017 4:16 PM
Simpson, Claude, Esq. Plaintiff: All Ins. Company: State Farm Insurance Type: No Fault Primary Insured: Ginglehmer, John A. Claim #: JG20150120 Demand: \$1,000,000 Offer: \$50,000 Negotiation

Page 1 of 2 (181 Items) 1 2 Show/Hide Columns

Plaintiff: All Ins. Company: State Farm Insurance Type: No Fault Primary Insured: Ginglehmer, John A. Claim #: JG20150120 Demand: \$1,000,000 Offer: \$50,000

By default, the preview pane is turned off, thus providing a view of as much of the table as will fit on the screen. In order to activate the preview pane, click on one of the preview icons located at the top of the table.



Clicking on the left icon will open the preview pane below the table; clicking on the right icon will open the preview pane to the right of the table. To close the preview pane, click on the active preview icon (the one shaded in yellow).

The Table

The table of notes contains a few features not found in most SmartAdvocate tables. There is a Clear Filter button above the table, which clears any filters currently being applied to the table (the same function as the Clear hypertext in the Filter Builder bar). There is a pair of buttons that allow you to change the location of the preview pane relative to the table (either below the table or to the right of the table). There is also an additional export icon beyond the



common three (), allowing you to export the notes to a report. Unlike the other export options, exporting to a report ignores the filters and columns in place when you perform the export; it always exports every row, with the following columns:

- Created: The date and time the note was created, and the staff member who created it.
- Type - Subject: The note's type.
- Notes: The full content of the note, including formatting.

The table of notes itself has the following available columns:

1. Date: The date and time the note was created.
2. Staff: The staff member who created the note. Equivalent to Created By.
3. Created By: The staff member who created the note. Equivalent to Staff.
4. Modified Date: The date and time the note was last modified.
5. Modified By: The staff member who last modified the note.
6. Note: The full content of the note, including formatting.
7. Plain Text Note: The full content of the note, with formatting removed.
8. Compact Note: A truncated version of the note, with formatting removed. If your case notes tend to be long, using this column in the table, in conjunction with the preview pane, can be more useful than using the Note column, which will lead to some rows being significantly taller than others. Because the length of the text in this column is limited, the amount that rows are stretched is limited too.
9. Type: The note's type.
10. !: The note's priority level.
11. Action: An action column containing a right-click icon. The right-click menu contains the options Edit, Email, Print, Copy, Delete, and Show History. For some notes that were automatically generated by the system, only Email and Print are functional.
12. Actions: An action column containing either an email icon and a print icon (for some notes that were automatically generated by the system) or an edit icon, email icon, print icon, copy icon, and delete icon.
13. Shared in CP: Whether the note has been shared in the Client Portal.

The add/edit form for notes is the same as the panel that appears when you [Add a Note](#) from the Case Quick Action Bar. Emailing a note brings up the Case Email panel with a slightly modified subject and the content of the note in the body of the email. Printing a note brings up browser print options; the content of the printed note includes the case number, name, type, and status, the note type, priority, date of creation, creator, date of modification, modifier, and the contents of the note. Copying a note brings up a panel allowing you to choose the case file to copy the note to; there are radio buttons allowing you to choose to copy the note to the same case, a related case, or a different case (which provides you a list of all cases).

| Date | Staff | Note | Type | Action |
|-------------------|-----------------------|--|-----------------------|--------|
| 3/2/2018 10:57 AM | Simpson, Claude, Ess. | To: Ginglehomer, John A. (914) 536-3203 Hello John, Please call Mary-Ann Spello at SmartAdvocate, LLC, (514) 555-1212, at your earliest convenience. Thank you! | Outgoing Text Message | |
| 3/1/2018 9:30 AM | Simpson, Claude, Ess. | Appointment Attending Staff: Simpson, Claude From: 03/01/2018 To: 03/01/2018 Location: Subject: Motion - Comments: Motion for SJ | Appointments | |
| 2/28/2018 9:30 AM | Simpson, Claude, Ess. | Appointment Attending Staff: Simpson, Claude From: 02/28/2018 To: 02/28/2018 Location: Subject: Arbitration - Comments: Demo | Appointments | |

Incomplete Notes

Occasionally a user may begin to enter a note but may not be able to complete and save it (perhaps due to the browser crashing or computer losing power). Should this occur, simply open the same case, go to the Notes page, and press the Add New Note button. The Add New Note panel will open, with the incomplete note recovered.

Documents

The Documents page contains all the documents that have been associated with the case. There are two main areas in this page: the table of documents itself, and a preview pane showing the content of the selected document.

The Table

The table of documents contains a few features not found in most SmartAdvocate tables. There is a Create Document button that opens the document generation page, allowing you to [Generate](#) a document using a template. There is an Attach Document(s) button that brings up the document attachment panel, allowing for [Attaching an Existing Document](#). There is a Clear Filter button above the table, which clears any filters currently being applied to the table (the same function as the Clear hypertext in the Filter Builder bar). There is a pair of buttons that allow you to change the location of the preview pane relative to the table (either below the table or to the right of the table). There is a set of checkboxes below the table, each of which affects whether certain documents are shown in the table. The Emails checkbox, when checked, makes emails sent from within SmartAdvocate or added to SmartAdvocate from Outlook visible in the table (by default they are filtered out, although the default can be changed in User Preferences). The Photographs checkbox, when checked, makes photographs added to SmartAdvocate visible in the table (by default the box is unchecked, although the default can be changed in User Preferences). The Only High and Critical checkbox, when checked, filters documents of Normal or Low priority out of the table. The Envelopes checkbox, when checked, makes documents in the Envelope subcategory of the Forms category visible in the table (they are filtered out otherwise). The Display Folders checkbox, when checked, shows the documents within a folder structure.

| Item | Priority | Folder | Category | Sub-Category | Description | Date | Action | From | Document To | To | Direction | DirectionID | Actions |
|------|----------|-----------|----------|--------------|--|-------------------|--------|-------------------|-------------|----------------------|-----------|-------------|---------|
| | | No Folder | Letter | Letter | Letters - Case Opening - Automobile Case - SA | 3/9/2018 1:04 PM | | SmartAdvocate LLC | Document | | Outgoing | | |
| | | No Folder | Letter | Letter | CLIENT - Case Opening Thank You to Client - Auto - Case Managers | 3/9/2018 11:30 AM | | SmartAdvocate LLC | Document | Gingelhyman, John A. | Outgoing | | |
| | | No Folder | Letter | Letter | Letters - Client - Advicing of EBT (retired date) - SA | 3/9/2018 10:50 AM | | SmartAdvocate LLC | Document | | Outgoing | | |

The table has the following available columns:

1. A Checkbox selector column used to select multiple rows of the table for mass actions.
2. Icon: An icon representing the type of document.
3. Description: A description of the document.
4. Category: The document's document category.
5. Sub-Category: The document's document subcategory.
6. Date: The date and time that the document was created.
7. From: The case contact that sent the document.
8. To: The case contact to whom the document was sent.
9. Direction: Either Incoming, Outgoing, or Memo, depending on whether the document was sent from the firm, to the firm, or within the firm.
10. Review: If the document's value to the case has been analyzed, this column will contain an icon indicating the results of the analysis; if the document has been reviewed, this column will contain a check-mark icon that, when hovered over, displays the name of the reviewer and the date and time of the review. The column can contain both types of icons.
11. Origin: The means by which the document entered the SmartAdvocate system. Among the possibilities are Attached, Generated, Scanned, and SA Email.
12. : The priority level of the document.
13. Action: A right-click icon. The right-click menu contains the options Open, Copy, Edit Properties, Email, Email Link, Download (rename), Download, Upload, Send to Folder, Share in Client Portal, and Delete. For documents with a doc, docx, xlsx or xls extension, the option Copy as PDF is also present. For emails that were sent from within SmartAdvocate, only Open, Email, Email Link, Send to Folder, and Delete are usable; the other options are greyed out.

Additional columns are available for the Documents table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are:

1. Actions: An action column containing either an open icon (for emails that were sent from within SmartAdvocate) or an open icon, a copy icon, an edit icon, and an email icon.
2. Comments: Any comments regarding the document.
3. Created By: The staff member who added the document to SmartAdvocate.
4. Created Date: The date and time that the document was added to SmartAdvocate. (This is slightly different than Date, which can be set manually at the time a document is added.)
5. Delivery Method: The method by which the document was delivered to the firm.
6. Document Modified By:
7. Document Modified Date:
8. Document Path:
9. Document Type: The document's document type. This column is based on the document's extension and the mapping defined in the [Document Type Groups](#) and [Document Type Extensions](#) picklists.
10. Extension: The characters after the period in the document's file name.
11. File Name: The document's file name in the SmartAdvocate system, excluding the extension.
12. Folder: The folder in which the document has been placed. Folders can be used to characterize the nature or type of a document, to make it easier to locate. Right click on any document, or click on the Action icon, and choose Send to Folder to place a document in an existing folder or to create and place the document in a new one.
13. Legacy Type: An older classification of the document. Among the possibilities are Document, Email, Incoming Mail, and Scanned Document.
14. Properties Modified By:
15. Properties Modified Date:
16. Shared In Portal: Whether the document is available in the Client Portal (not yet implemented; coming in a future release).
17. Shared With Everyone:

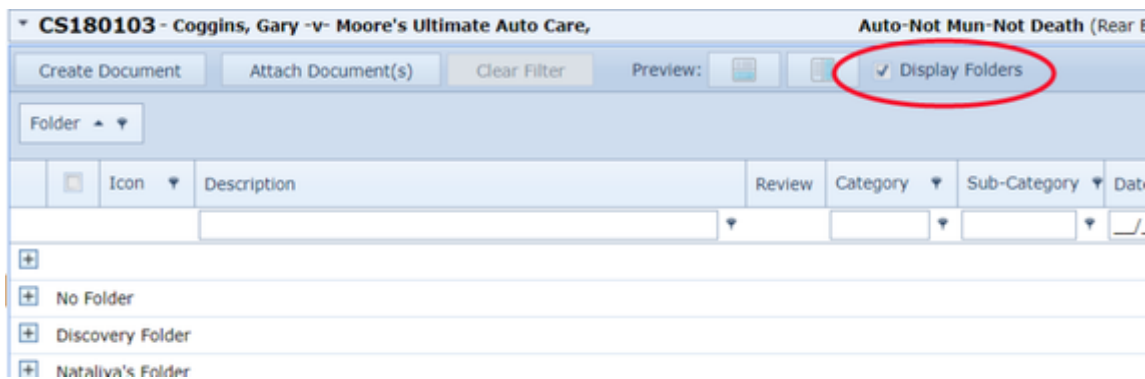
Opening a document opens the underlying file using your computer's default program for opening files of its type. Copying a document brings up a panel allowing you to choose the case file to copy the document to; there are radio buttons allowing you to choose to copy the note to the same case, a related case, or a different case (which provides you a list of all cases). Copying a document as a PDF creates a new document in the same case, whose underlying file is the copied file converted to a PDF. Editing the properties of a document brings up the same panel for document details that [Attaching an Existing Document](#) does. Emailing a document brings up the Case Email panel with the document's underlying file attached to the email. Selecting Download (rename) opens up a file renaming panel allowing you to rename the file, then downloads the underlying file (with the new name) through your browser. Selecting Download downloads the underlying file through your browser. Selecting Upload opens a panel allowing you to choose a file to upload from your computer; the chosen file will replace whatever the underlying file of the document previously was. Note that the name of the file in SmartAdvocate will not change, including the file extension, so it is strongly recommended that you not use this function to replace a file with another file of a different extension; this may cause the file to be impossible to open or read. Selecting Delete brings up a confirmation message (to prevent accidental deletion); clicking OK in the confirmation message deletes the file from the table.

Document Folders

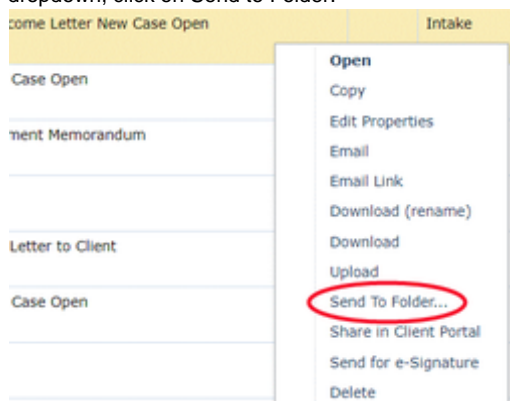
Document folders can be created within each case. Folders can be used to characterize the nature or type of a document, to make it easier to locate. Note that folders are used for viewing purposes only; no actual folders are created on the user's or network drive.

Folders (called "System Folders") can be created by the firm's SmartAdvocate Admin, in which case they will be available for all users in every case. Folders (called "User Folders") can also be created by each user. User Folders will only be available to the specific user who created it, and only in the case in which the folder was created. Documents placed in a System Folder by any user will be visible in that folder for all users. Documents placed in a User Folder will only be visible in that folder to the individual who placed it in the folder, even if other users have created identical User Folders in their system.

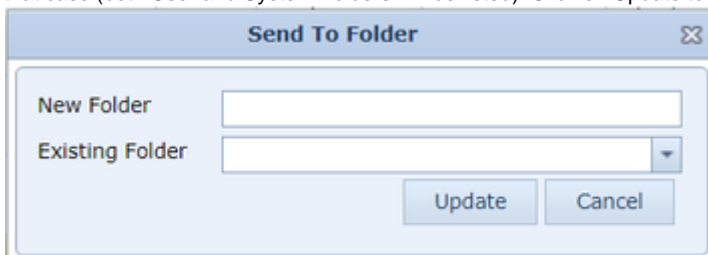
To view documents in their Folders, click on the Display Folders checkbox.



Click on the plus sign **+** to the left of the folder name to see a list of the documents in that folder. To place a document in a folder, or to move the document from one folder to another, right click on the document or click on the action icon. In the dropdown, click on Send to Folder.



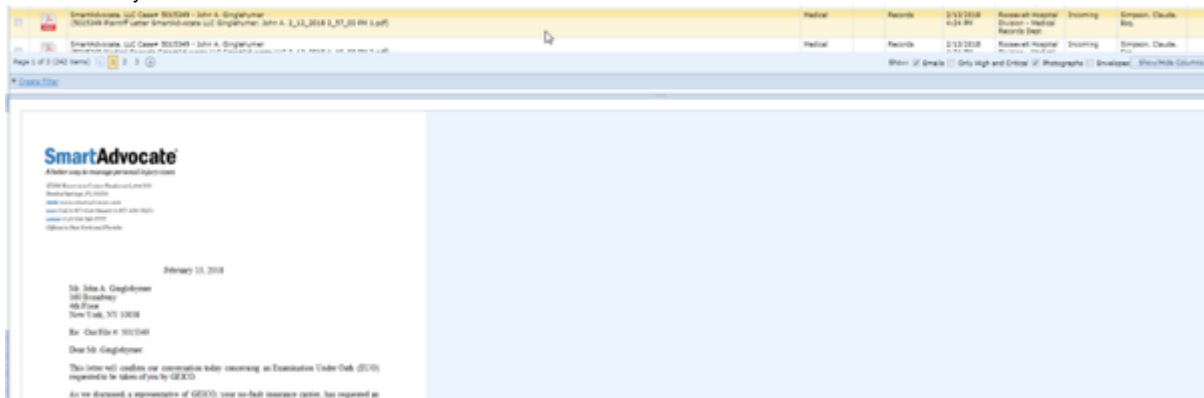
A panel will open that will allow you to either create a new folder (by simply typing the name of the new folder) or select one of the folders available in that case (both User and System Folders will be listed). Click on Update to move the document to the folder.



Document folders can also be chosen when generating a document from a template.

Preview Pane

This area allows you to view the contents of a document without actually opening it. You can change the relative size of the preview pane and the table of documents by dragging the border between them to a point of your choosing. Most files will be visible in the preview pane, but not all file extensions are supported. Additionally, different files are handled slightly differently by the preview pane. Image files will automatically scale to be as large as possible while fitting entirely inside the pane. The text in text-based documents will shift to fit horizontally in the pane, though this may cause a need to scroll vertically; images embedded in text-based documents will not be scaled at all, so it may be necessary to scroll vertically or horizontally to see them in their entirety. PDF documents will not be scaled at all.



Emails

NOTE: As of the writing of the Manual, the Emails page is still in Beta and therefore may not be available to all users. It should be accessible by all users in the next release of SmartAdvocate.

The Emails page contains all the emails that have been associated with the case. There are two main areas in this page: the table of emails itself, and a preview pane showing the content of the selected email.

The Table

The table of emails contains a few features not found in most SmartAdvocate tables. There is a Clear Filter button above the table, which clears any filters currently being applied to the table (the same function as the Clear hypertext in the Filter Builder bar). There is a pair of buttons that allow you to change the location of the preview pane relative to the table (either below the table or to the right of the table). The Display Folders box allows you to view the emails based on the folders to which they have been assigned.

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
|--------------------------|---|---------------|---|-------|-------------------|--------------------|----------|-------------------------------------|----------|----|----|
| <input type="checkbox"/> | File: SA AA2 Opportunity Form (Email) | Exchange Mail | | Email | 7/6/2018 9:49 AM | SmartAdvocate, LLC | Incoming | Bidy, Natalya | Attached | | |
| <input type="checkbox"/> | File: SA AA2 Opportunity Form (Email) | Exchange Mail | | Email | 7/6/2018 9:49 AM | SmartAdvocate, LLC | Incoming | Bidy, Natalya | Attached | | |
| <input type="checkbox"/> | Your Intake Packet From SmartAdvocate, LLC | | | | 6/13/2018 1:49 PM | Oreis, Harry | Outgoing | jahngngfhymer@google. | SA Email | | |
| <input type="checkbox"/> | SmartAdvocate, LLC Case# 5015346 - John A. Gingshlymer - TEST EMAIL | | | | 5/3/2018 12:51 PM | Oreis, Harry | Outgoing | Oreis, Harry <harry@smartadvocate.c | SA Email | | |

The table has the following available columns:

1. **Checkbox:** A Checkbox selector column used to select multiple rows of the table for mass actions.
2. **Description:** A description of the email (typically the Subject line of the email).
3. **Category:** The email's category.
4. **Review:** If the email's value to the case has been analyzed, this column will contain an icon indicating the results of the analysis; if the email has been reviewed, this column will contain a check-mark icon that, when hovered over, displays the name of the reviewer and the date and time of the review. The column can contain both types of icons.
5. **Sub-Category:** The email's subcategory.
6. **Date:** If the email was created within SmartAdvocate, the date and time that the email was created; otherwise the date and time it was attached to the case using the Outlook plugin.
7. **From:** The case contact that sent the email.
8. **To:** The case contact to whom the email was sent.
9. **Direction:** Either Incoming, Outgoing, or Memo, depending on whether the email was sent from the firm, to the firm, or within the firm.
10. **:** The priority level of the email.
11. **Origin:** The means by which the email entered the SmartAdvocate system. Among the possibilities are Attached and SA Email.
12. **Action:** A right-click icon. The right-click menu contains the options Open, Copy, Edit Properties, Email, Email Link, Download (rename), Download, Upload, Send to Folder, Share in Client Portal, and Delete.

Additional columns are available for the Emails table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Folder, Actions, Comments, Created By, Created Date, Delivery Method, Document Type, Document Path, Extension, File Name, Icon, Legacy Type, Modified By, modify Date, Shared In Portal, and Shared With Everyone.

Opening an email opens the underlying file using either SmartAdvocate or Outlook, depending on your settings in User Preferences. Copying an email brings up a panel allowing you to choose the case file to copy the email to; there are radio buttons allowing you to choose one of the last ten visited cases (including the case the email is already in), or you can type in a case number directly to copy the email to that case. Selecting Delete brings up a confirmation message (to prevent accidental deletion); clicking OK in the confirmation message deletes the email from the table.

Preview Pane

This area allows you to view the contents of an email without actually opening it. You can change the relative size of the preview pane and the table of emails by dragging the border between them to a point of your choosing. The text in text-based emails will shift to fit horizontally in the pane, though this may cause a need to scroll vertically; images embedded in text-based emails will not be scaled at all, so it may be necessary to scroll vertically or horizontally to see them in their entirety.

| File: Car Wreck Photos (Email) | Exchange Mail | Email | 4/23/2018 11:08 AM | SmartAdvocate, LLC | Incoming | Bidy, Natalya | Attached |
|---|---------------|-------|--------------------|--------------------|----------|--------------------|----------|
| SmartAdvocate, LLC Case# 5015346 - Colin Montgomery (Email) | Exchange Mail | Email | 4/20/2018 7:31 AM | SmartAdvocate, LLC | Incoming | SmartAdvocate, LLC | Attached |

Page 1 of 1 (60 items) [1] [2] Show/Hide Columns

Create Filter

From: Simpson, Claude, Esq.
To: Simpson, Claude <claude@smartadvocate.com>
CC: Simpson, Claude <claude@smartadvocate.com>
Subject: SmartAdvocate, LLC Case# 5015346 - Colin Montgomery

Dear Counsel:

Per our recent discussions, attached are the discovery material responsive to your discovery demands dated February 20, 2018.

Sincerely,
Plaintiff's Attorney

Photographs

The Photograph page allows you to view image files that have been saved to the case file in documents. All of the files that appear in the Photograph page also appear in the Documents page, and the document properties are also shared between the two pages; however, the Photograph page allows you to see all the images in a case at a glance, and conveniently print or email them as needed. You can also add images to the case file directly through this page (they will also appear in the Documents page once you have done so).

The Structure of This Page



1. Add New Photograph button. Used to add images to the case file. See [Adding an Image](#).
2. Print Selected button. Used to print multiple images. See [Actions for Multiple Images](#).
3. Email Selected button. Used to email multiple images. See [Actions for Multiple Images](#).
4. Grid Pagination tool. Used to navigate through pages of images. Also shown on bottom of page. See [Grid Pagination](#).
5. Page Sizing tool. Used to customize the size of the photo grid by altering the number of rows of photographs visible on a page. The size of the individual photographs does not change; accordingly, increasing the number of visible rows may require you to scroll through the photographs to view all of them. Also shown on bottom of page. See [Page Sizing](#).
6. Image Grid. Displays the photographs and allows various actions to be performed on them. See [Image Grid](#).

Image Grid

The image grid is the main part of the Photograph page. Here, the images are arranged in a grid, with four on each row. The images in the grid are cropped and resized so that they all appear in equal-size squares in the grid, which may mean that parts of non-square images are not visible in the grid; however, the actual image files are not affected. You can click any image to view it fully, at its normal size. See [Image Viewer](#). Each image in the grid has an action bar across the bottom of the image. The bar is normally nearly transparent; hover the mouse over an image to make the bar more visible. The bar contains the following elements:

1. The description of the image (if any).
2. An Edit link. See [Editing Image Properties](#).
3. A Print link. See [Printing an Image](#).
4. A More... link. Clicking this button brings up a menu of additional actions, specifically Open, Email, and Delete. See [Opening an Image](#), [Emailing an Image](#), and [Deleting an Image](#).
5. A checkbox. Used to select multiple images for printing or emailing. See [Actions for Multiple Images](#).

Editing Image Properties

To edit the properties of an image in the grid:

1. Click the Edit link in the action bar of the image whose properties you wish to edit. This will bring up an Add/Edit panel for photographs, with the existing information filled in.
 2. Fill the fields in with your desired information. See [The Add/Edit Photograph Panel](#) for details about the fields.
 3. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Printing an Image

To print an image:

1. Click the Print link in the action bar of the image you wish to print. This will open a new tab containing only the image, and immediately bring up your browser's print options for that tab.
2. Select the print options you desire and print the image. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing only the image will remain open. You may close this if you wish.

Opening an Image

To open an image:

1. Click the More... link in the action bar of the image you wish to open. This will bring up a menu of options.
2. Click the Open option in the menu. This will open the underlying image file in your computer's standard viewer for files with the image's file extension. (Changing the standard viewer for a given file extension is possible, but outside the scope of this manual.)

Emailing an Image

To email an image:

1. Click the More... link in the action bar of the image you wish to email. This will bring up a menu of options.
 2. Click the Email option in the menu. This will open the Case Email panel with the underlying image file attached to the email.
 3. Fill out the email with your desired content.
 4. Click Send to send the email.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Deleting an Image

To delete an image:

1. Click the More... link in the action bar of the image you wish to delete. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the image, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Grid Pagination

The Grid Pagination tool allows you to navigate through pages of images if all the images do not fit on one page. The tool contains the following elements:

1. First page button. Click to navigate to the first page of images.
2. Previous page button. Click to navigate to the previous page of images.
3. Individual page list. Click any number in this list to navigate directly to that page of images.
4. Next page button. Click to navigate to the next page of images.
5. Last page button. Click to navigate to the last page of images.

Page Sizing

The Page Sizing tool allows you to change the number of rows on each page of the grid. To do so:

1. Click the dropdown in the tool.
2. Select the number of rows you wish there to be on each page of the grid.
 - The size of the individual photographs does not change; accordingly, increasing the number of visible rows may require you to scroll through the photographs to view all of them.
 - Selecting "All" will put all the images on one page. This is not recommended if you have an extremely large number of images in a case.

Adding an Image

To add a new image:

1. Make sure you have the image on your computer and know where the file is stored.
 2. Click the Add New Photograph button. This will bring up a panel with a Browse... button.
 3. Click the Browse... button. This will open up a file explorer window.
 4. Navigate to the image file you wish to add and select it, probably by clicking the file then clicking Open (this may be different for different operating systems or browsers). This will cause it to be automatically uploaded to SmartAdvocate and expand the panel to include the property editing fields.
 5. You may repeat steps 3 and 4 as many times as you wish to add multiple images at once. Note that any information you add in the next step will be applied to each of the images you add simultaneously.
 6. Fill the fields in with your desired information. See [The Add/Edit Photograph Panel](#) for details about the fields.
 7. Click Save to save the image in SmartAdvocate and close the panel.
- If you decide you do not wish to save the image in SmartAdvocate, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Actions for Multiple Images

You can print or email multiple images at once. To select the images on which you wish to perform the collective action, click the checkbox located in the bottom right corner of each image you wish to select. This may require navigating between pages of the grid. Navigating between pages will not undo any of your selections, and images will remain selected even if they are not visible on the current page. If you do not want to include an image you have selected, click the checkbox again to deselect it.

Once you have selected the images, to print them:

1. Click the Print Selected button. This will open a new tab containing all of the selected images, and bring up your browser's print options for that tab.
2. The Print Selected button will have the number of selected images listed in parentheses, to help ensure you have selected the images you intended to.
3. Select the print options you desire and print the images. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)

Alternately, to email them:

1. Click the Email Selected button. This will open the Case Email panel with the underlying image files for all of the selected images attached to the email.
 2. The Email Selected button will have the number of selected images listed in parentheses, to help ensure you have selected the images you intended to.
 3. Fill out the email with your desired content.
 4. Click Send to send the email.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

The Add/Edit Photograph Panel

The Add/Edit Photograph Panel contains the following fields:

1. Category: The document category to apply to the image.
2. Sub-Category: The document subcategory to apply to the image.
3. From: The contact that sent the image. Selecting the checkbox automatically fills the dropdown with your firm. The dropdown's contents include all that case's case contacts and all universal case contacts.
4. To: The contact from whom the image was sent. Selecting the checkbox automatically fills the dropdown with your firm. The dropdown's contents include all that case's case contacts and all universal case contacts.
5. Priority: The priority level of the image.
6. Description: A description of the image.

Image Viewer

The Image Viewer is a screen you can access from the Photograph page that lets you view each image individually against a black background, navigate between different images, or view the entire set of case images, one at a time, in a slideshow. To access the Image Viewer, click any image in the Image Grid; that image will become the current image in the Image Viewer. To leave the Image Viewer, click the white X in the upper right of the screen.

The viewer contains the following elements:



1. Play/pause button. Located in the upper right corner of the screen. Used to start and stop the slideshow. The slideshow will automatically scroll the current image forward to the next image at a regular rate. If the current image is the last one, the slideshow will scroll forward to the first image.
2. Close button. Click the X in the upper right corner to close the Image Viewer.
3. Current image. The individual image presently being viewed. This image appears at its actual dimensions, with no resizing.
4. Forward button. Click to scroll the current image to the next image.
5. Backward button. Click to scroll the current image to the previous image.
6. Image Thumbnails. Contains all the images in the case file, resized to small squares of equal size. Click any thumbnail to make that image the current image.
7. Page forward. Click to scroll several image thumbnails to the right.
8. Page backward. Click to scroll several image thumbnails to the left.

Investigations

The Investigations page allows you to view and record the details of investigations, police reports, and witness information related to the case.

The Structure of This Page



1. Add Investigation button. Used to add investigation details to the case file. See [Adding an Investigation](#).
2. Add Note button [Investigations section]. Used to add Investigations notes to the case file. See [Adding a Note](#).
3. Investigations table. Contains the investigation details and allows various actions to be performed on them. See [Investigations Table](#).
4. Investigation Documents link. Opens the [Documents](#) case page with an automatic filter for Investigations. See [Viewing Investigation Documents](#).
5. Add Police Report button. Used to add details regarding the police report to the case file. See [Adding a Police Report](#).
6. Add Note button [Police Reports section]. Used to add Police Report notes to the case file. See [Adding a Note](#).
7. Police Reports table. Contains the police report details and allows various actions to be performed on them. See [Police Reports Table](#).
8. Police Report Documents link. Opens the [Documents](#) case page with an automatic filter for Police Reports. See [Viewing Police Report Documents](#).
9. Add Witness button. Used to add witness details to the case file. See [Adding a Witness](#).
10. Add Note button [Witnesses section]. Used to add Witness notes to the case file. See [Adding a Note](#).
11. Witnesses table. Contains the witness details and allows various actions to be performed on them. See [Witnesses Table](#).
12. Witness Documents link. Opens the [Documents](#) case page with an automatic filter for Witness. See [Viewing Witness Documents](#).
13. Add New Note button. Used to add Investigations, Police Report, or Witness notes to the case file. See [Adding a Note](#).
14. Notes table. Contains Investigations, Police Report, and Witness notes, and allows various actions to be performed on them. See [Notes Table](#).

Investigations Table

The Investigations table is where the details of non-police investigations are stored. Each row of the table represents an individual investigation. See [Table](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Investigations table contains the following available columns:

| Investigation Type | People | Dates | Comments | Docs | Is Referred by Law Firm | Method Of Service | Will Testify | |
|---|---|----------------------|---|------|-------------------------|-------------------|--------------|--|
| Type: Product Testing Location: Defense counsel's office | Investigator: GEM-robotics LTD Provided by: Rospood, Mary Staff Requested: Baez, Dayhanara M. | Assigned: 11/13/2017 | | 0 | | Regular Mail | | |
| Type: Site Inspection Location: Intersection of Main St. and 3 | Investigator: Premier Defense, LLC | | Inspector will review location of accident and report on any anomalies found. | 0 | | | | |

1. Investigation Type: The investigative action taken and the location of the investigative action.
2. People: The people relevant to the investigation (the investigator, source of records, provider of materials, investigation scheduler, and requesting staff member).
3. Dates: The date the investigation was assigned, the date of the investigation appointment or expected completion of the investigation, and the date the investigation was completed.
4. Comments: Any comments about the investigation.
5. Docs: The number of documents associated with the investigation and a link to the documents in the [Documents](#) case page.
6. Is Referred by Law Firm: Whether the investigation was performed at the request of the firm or separately.
7. Method Of Service: The method of service of the request involved in the investigation.
8. Will Testify: Whether the person responsible for the records or statement is willing to testify.
9. [column with no title]: Action icon, a right-click menu that contains Edit and Delete.

Editing an Investigation

To edit an investigation:

1. Click the [right-click icon](#) in the untitled column of the row representing the investigation you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for investigations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Investigation Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Investigation

To delete an investigation:

1. Click the [right-click icon](#) in the untitled column of the row representing the investigation you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the investigation, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Investigation

To add a new investigation:

1. Click the Add Investigation button. This will bring up an Add/Edit panel for investigations, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Investigation Panel](#) for details about the fields.
3. Click Save to save the investigation and close the panel.
 - If you decide you do not wish to save the investigation, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Viewing Investigation Documents

To view all investigation-related documents in the case, click the Investigation Documents link. This will open the [Documents](#) case page in a new window, automatically filtered for documents whose category or subcategory is Investigations. (For this reason, it is recommended that you categorize or subcategorize all investigation-related documents as Investigations. See the [Document Categories](#) and [Document Sub-Categories](#) picklists for managing document categories and subcategories.) Note: The Investigation Documents link will also have the number of investigation-related documents in the case listed in parentheses.

The Add/Edit Investigation Panel

The Add/Edit Investigation Panel allows you to fill in the details of an investigation. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Created at 3/15/2018 2:39:00 PM by Dreier, Harry.

1. Assigned To / Investigator: The contact responsible for conducting the investigation.
2. Date Assigned: The date the investigation was assigned.
3. Method of Service: The method of service of the request involved in the investigation.
4. Investigation Type: The type of investigative requested.
5. Obtained From: The source of any records obtained during the investigation.
6. Will Testify: Whether the person who provided the records or statement is willing to testify.
7. Provided By: The provider of materials involved in the investigation.
8. Scheduled By: The contact who scheduled the investigative action.
9. Location: The location of the investigation. This field is limited to 30 characters; if an entry in this field is longer than 30 characters, only the first 30 characters will be saved and displayed.
10. Appointment/Expected Completion: The date of the investigation appointment or expected completion date of the investigation.
11. Date Completed: The date the investigation was completed.
12. Staff: The staff member who requested the investigation.
13. Comments: Any comments about the investigation.
14. Is Referred by Law Firm: Whether the investigation was performed at the request of the firm or otherwise.

Police Reports Table

The Police Reports table is where the details of police reports are stored. Each row of the table represents an individual police report. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Police Reports table contains the following available columns:

| Report | Police | Dates | People | Report Favorable | Comments | Docs |
|---|---|--|---|------------------|----------|------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 8 |
| Type: Investigative Report Number: 123456-17 | Division: Traffic Division Police Officer: Cheryl Ingram, Precinct: 6th | Report Requested: 2/5/2018 Report Received: 3/15/2018 | Obtained From: New Castle Police Department Report Provided By: Suffolk County Police Department - 6th Precinct | Yes | | |

1. Report: The type and identification number of the police report.
2. Police: The details of the police department involved (the department name, division, police officer responsible for the report, and police precinct).
3. Dates: The date the report was requested by the firm, and the date it was received by the firm.
4. People: The contact that sent the report to the firm, and the contact that initially provided the report.
5. Report Favorable: Whether the police report is considered favorable to the case.
6. Comments: Any comments about the police report.
7. Docs: The number of documents associated with the police report and a link to the documents in the [Documents](#) case page.

- [column with no title]: A [Right-click icon](#); the right-click menu contains Edit and Delete.

Editing a Police Report

To edit a police report:

- Click the [right-click icon](#) in the untitled column of the row representing the police report you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
- Click the Edit option in the menu. This will bring up an Add/Edit panel for police reports, with the existing information filled in.
- Fill the fields in with your desired information. See [The Add/Edit Police Report Panel](#) for details about the fields.
- Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Police Report

To delete a police report:

- Click the [right-click icon](#) in the untitled column of the row representing the police report you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
- Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the police report, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Police Report

To add a new police report:

- Click the Add Police Report button. This will bring up an Add/Edit panel for police reports, blank except for defaults.
- Fill the fields in with your desired information. See [The Add/Edit Police Report Panel](#) for details about the fields.
- Click Save to save the police report and close the panel.
 - If you decide you do not wish to save the police report, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Viewing Police Report Documents

To view all police report documents in the case, click the Police Reports link. This will open the [Documents](#) case page in a new window, automatically filtered for documents whose category or subcategory is Police Report. (For this reason, it is recommended that you categorize or subcategorize all police report documents as Police Report. See the [Document Categories](#) and [Document Sub-Categories](#) picklists for managing document categories and subcategories.) Note: The Police Reports link will also have the number of police report documents in the case listed in parentheses.

The Add/Edit Police Report Panel

The Add/Edit Police Report Panel allows you to fill in the details of a police report. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

- Obtained From: The contact that sent the report to the firm.
- Department: The name of the police department involved in the report.
- Division: The name of the division of the police department involved in the report.
- Police Officer: The police officer responsible for the report.
- Precinct: The precinct of the police department involved in the report.
- Report Number: The identification number of the report.
- Report Type: The type of the police report.
- Report Requested: The date the report was requested by the firm.
- Date Completed: The date the report was received by the firm.
- Report Provided By: The contact that initially provided the report.
- Report Favorable: Whether the police report is considered favorable to the case.
- Comments: Any comments about the police report.

Witnesses Table

The Witnesses table is where details about witnesses are stored. Each row of the table represents an individual witness. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Witnesses table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|-----------------|-------------------|---|---|-----|-----|---|--|---|----|
| Scrooge, Ancele | Non Party Witness | | | Yes | Yes | | Witness was a passenger in the vehicle immediately to the rear of defendant's vehicle. | 0 | |

1. Witness: The name of the witness.
2. Role: The witness's role in the case.
3. Statement Request Date: The date the witness's statement was requested by the firm.
4. Statement Received Date: The date the witness's statement was received by the firm.
5. Has Important Records: Whether the witness is in possession of records important to the case.
6. Comments: Any comments about the witness.
7. Docs: The number of documents associated with the witness and a link to the documents in the [Documents](#) case page.
8. [column with no title]: A [Right-click icon](#); the right-click menu contains Edit and Delete.
9. Is Favorable: Whether the witness's statement is considered favorable to the case.
10. Will Testify: Whether the witness is willing to testify.

Editing a Witness

To edit a witness:

1. Click the [right-click icon](#) in the untitled column of the row representing the witness you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for witnesses, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Witness Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Witness

To delete a witness:

1. Click the [right-click icon](#) in the untitled column of the row representing the witness you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the police report, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Witness

To add a new witness:

1. Click the Add Witness button. This will bring up an Add/Edit panel for witnesses, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Witness Panel](#) for details about the fields.
3. Click Save to save the witness and close the panel.
 - If you decide you do not wish to save the witness, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Viewing Witness Documents

To view all witness-related documents in the case, click the Witness Documents link. This will open the [Documents](#) case page in a new window, automatically filtered for documents whose category or subcategory is Witness. (For this reason, it is recommended that you categorize or subcategorize all witness documents as Witness. See the [Document Categories](#) and [Document Sub-Categories](#) picklists for managing document categories and subcategories.) Note: The Witness Documents link will also have the number of witness-related documents in the case listed in parentheses.

The Add/Edit Witness Panel

The Add/Edit Witness Panel allows you to fill in details about a witness. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Created at 3/15/2018 2:42:00 PM by Dreier, Harry.

Save Cancel

1. Witness: The name of the witness.
2. Role: The witness's role in the case.
3. Is Favorable: Whether the witness's statement is considered favorable to the case.
4. Will Testify: Whether the witness is willing to testify.
5. Statement Request Date: The date the witness's statement was requested by the firm.
6. Statement Received Date: The date the witness's statement was received by the firm.
7. Has Important Records: Whether the witness is in possession of records important to the case.
8. Comments: Any comments about the witness.

Notes Table

The Notes table displays the details of notes that have the Investigations, Police Report, or Witness type. Each row of the table represents an individual note. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below. See the [Notes](#) case page for viewing notes of all types.

Columns in the Table

The Notes table contains the following available columns:

| Date | Staff | Notes | Type | Action |
|-------------------|-------------|---|----------------|--------------------|
| 3/15/2018 2:40 PM | Drew, Harry | Item provided to expert for review and testing. | Investigations | [Right-click icon] |
| 2/5/2018 10:33 AM | | Vehicle/Property Damage Appraisal scheduled | Investigations | [Right-click icon] |
| 2/5/2018 10:33 AM | | Investigator assigned for Report & Photos of Accident Scene | Investigations | [Right-click icon] |

1. Date: The date and time the note was created.
2. Staff: The staff member who created the note.
3. Notes: The content of the note, including formatting.
4. Type: The note's type.
5. [column with no title]: A [Right-click icon](#); the right-click menu contains Edit, Email, Print, Copy, and Delete.
6. [Priority]: The priority level of the note.

Editing a Note

To edit a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for notes, with the existing information filled in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Emailing a Note

To email a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Email option in the menu. This will open the Case Email panel with the note's creator, date and time of creation, and content automatically entered in the body of the email.
3. Fill out the email with any desired additional content.
4. Click Send to send the email.
 - If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Note

To print a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Print option in the menu. This will open a new tab containing the details of the note, and immediately bring up your browser's print options for that tab.
 - The details of the note include the number, name, type and status of the case the note is part of; the note's type and priority level; the date the note was created; the staff member who created the note; the date the note was modified; the staff member who modified the note; and the contents of the note.
3. Select the print options you desire and print the note. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing the note will remain open. You may close this if you wish.

Copying a Note

To copy a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.

2. Click the Copy option in the menu. This will bring up a panel allowing you to choose the case file to which you want to copy the note. The panel contains a **Radio button** group for the last ten cases you have visited (including the case the note is already in, in case you wish to put an additional copy of the note in the same file). It also includes a **Text input** field in which you can enter a different case number, in case you wish to copy the note to a case other than the ten listed.
3. If you wish to copy the note to one of the last ten cases you have visited, click the radio button associated with that case. If you wish to copy the note to some other case, instead type that case's case number in the text input field.
4. Click Copy to copy the note to the chosen case file.
 - If you decide you do not wish to copy the note, click Cancel instead of clicking Copy to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Note

To delete a note:

1. Click the **right-click icon** in the untitled column of the row representing the note you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the note, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Note

To add a new note:

1. Click the Add Note button in either the Investigations, Police Reports, or Witnesses table, or alternatively, click the Add New Note button in the Notes table and then click one of the options (Investigations, Police Report, or Witness) in the menu that appears. This will bring up The Add/Edit Note Panel with the type already selected.
 - The note type will be Investigations if you clicked Add Note in the Investigations table or clicked the Investigations option in the menu after clicking Add New Note in the Notes table. The same idea holds for the Police Report and Witness note type.
 - The note type will still be editable; in theory, you could add any type of note starting from the Investigations page. However, it is generally better practice to use the Add a Note icon in the Quick Action Toolbar for notes of arbitrary types.
1. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Case Value

The Case Value page allows you to view the various expenses must be paid from any settlement at the close of the case.

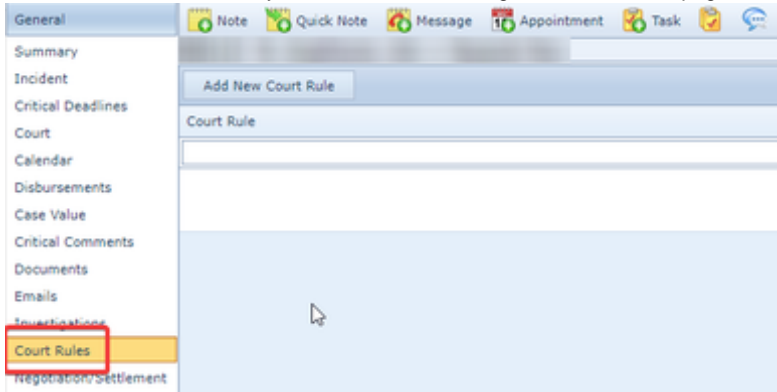
Court Rules

SmartAdvocate integrates with CalendarRules, which provides automatic calendar rules for many courts throughout the United States. CalendarRules can automatically add Critical Deadlines, Appointments, and Tasks to SmartAdvocate based on the court rules of the appropriate jurisdiction. A subscription with CalendarRules is required for this integration to function.

SmartAdvocate may, in the future, integrate with other services that provide court calendaring services. Please contact your sales representative at 877-GET-SMART (877-438-7627) for additional information.

The information in this manual specifically describes the SmartAdvocate – CalendarRules integration.

The Court Rules functionality can be accessed through the Court Rules page within a case.



Creating a Court Rule

To add a new court rule, click on the Add New Court Rule button. This will open a panel to choose the jurisdiction and other information that will allow the creating of the appropriate critical deadlines, appointments, and tasks.

The screenshot shows a 'Court Rule' panel with the following fields and a table:

- Jurisdiction:** A dropdown menu with a red circle '1' next to it.
- Trigger:** A dropdown menu with a red circle '2' next to it.
- Name:** A text input field with a red circle '3' next to it.
- Trigger Date:** A date picker with a red circle '4' next to it.
- Get Court Rules:** A button with a red circle '5' next to it.
- Activity List:** A table with columns 'ActivityType', 'Date', 'Time', and 'Description'. It currently shows 'No data to view' with a red circle '6' next to it.

At the bottom of the panel are 'Save' and 'Cancel' buttons.

1. Jurisdiction: The court from which the rules will be taken.
2. Trigger: The event the occurrence of which will trigger the creation of critical deadlines, appointments, and/or tasks in the case calendar.
3. Name: The name for the court rule. This field will auto populate with the description of the Trigger, however you will be able to edit, replace or remove the information in the field.
4. Trigger Date: The date on which the Trigger occurred.
5. Get Court Rules: Click to create the list of events that will be added to SmartAdvocate, based on the jurisdiction, trigger, and trigger date entered.
6. Activity List: List of the critical deadlines, appointments, and tasks that will be created based upon the rule.

Fields in the Court Rule Panel

Jurisdiction

The jurisdictions available may depend upon the specific subscription your firm has with the rules provider. Click on the down arrow to reveal a list of all available jurisdictions, including each specific court (and, where available, even specific judges) from which you can choose.

The screenshot shows the 'Court Rule' panel with the 'Jurisdiction' dropdown menu open. The menu lists several options, including 'New York Supreme Court Queens' (highlighted), 'JAMS Comprehensive Arbitration Rules and Procedures (w/ Holidays)', 'New York Appellate Division First Department', 'New York Appellate Division Second Department', 'New York Appellate Division Third Department', 'New York Appellate Division Fourth Department', 'New York Supreme Court (No Local Rules)', and 'New York Court of Appeals'. A red arrow points to the dropdown arrow on the 'Jurisdiction' field.

Trigger

The Trigger is the event the occurrence of which will trigger the creation of critical deadlines, appointments, and/or tasks in the case calendar. The list of possible trigger events is provided and set by the rules provider.

The screenshot shows the 'Court Rule' panel with the 'Trigger' dropdown menu open. The menu lists several options, including 'Summons and Complaint Served by Personal Deliv' (highlighted), 'Summons and Complaint Served by Personal Delivery Made on Defendant Inside State', 'Summons and Complaint Served by Personal Delivery Made on Defendant Outside State', 'Summons and Complaint Served by Personal Delivery on Agent Made Inside or Outside State', 'Summons and Complaint Served by Personal Delivery on Secretary of State under BCL 306', 'Summons Published (Service by Publication as Authorized by Court)', 'Summons Served', and 'Taxation of Costs, Date and Time Fixed'. A red arrow points to the dropdown arrow on the 'Trigger' field.

Name

By default, the name for the court rule is set as the description of the Trigger, however you will be able to edit, replace or remove the information in the field.

Trigger Date

Click on the down arrow to choose the date from which the events created by the rule will be calculated (such as the date the summons and complaint were served, or the date an Order was entered).

Create the Rules

Once the criteria for the rules have been set, click on the Get Court Rules button to populate the rules table.

| ActivityType | Date | Time | Description |
|-------------------|-----------|------|---|
| Task | 7/30/2018 | | Day of Discovery Cutoff |
| Appointment | 5/31/2018 | | L/D to Hold Compliance Conference (Differentiated Case Management) |
| Critical Deadline | 7/10/2018 | | L/D to Serve Written Discovery Requests, Notices of Deposition, and Notices for Physical/Mental Examination prior to Discovery Cutoff (Hand/Electronic Means) |
| Critical Deadline | 7/5/2018 | | L/D to Serve Written Discovery Requests, Notices of Deposition, and Notices for Physical/Mental Examination prior to Discovery Cutoff (all) |
| Critical Deadline | 7/3/2018 | | L/D to Serve Written Discovery Requests, Notices of Deposition, and Notices for Physical/Mental Examination prior to Discovery Cutoff (Mail Outside State) |
| Critical Deadline | 7/6/2018 | | L/D to Serve Written Discovery Requests, Notices of Deposition, and Notices for Physical/Mental Examination prior to Discovery Cutoff (Overnight Delivery) |

1. a. i. Get Court Rules: Click on the Get Court Rules button to populate the rules table based upon the criteria selected.
- ii. Rules Table: List of the appointments, tasks, and critical deadlines that will be created in the case based upon the rule.
- iii. Save: Click on the Save button to add the events from the rule into the case.

Court Rules will automatically choose an event type (appointment, task, or critical deadline) for each entry in the rules table. However, each individual entry can be edited to change the event type or not be entered into the case at all. Click on the activity and then on the down arrow to view a list of the available options.

ActivityType

Task

Appointment

Critical Deadline

Don't Add

Appointment

Task

Critical Deadline

Once you save the Court Rule, the various events it creates will be entered in the Case Calendar.

Retainer/Referral

The Retainer/Referral page allows you to view and record the details of the case's retainer, referral source, and any referrals out or substitutions of attorney.

The Structure of This Page

Note: The tables in this page only appear if they contain at least one row. For that reason, in actual cases, this page will almost certainly contain only a few of these tables.

The screenshot displays three main tables: Retainer, Referral, and Refer Out/Sub Out. Red circles 1-18 are placed over various UI elements:

- 1: Recovered Client checkbox in the Retainer table header.
- 2: Add Retainer button in the Retainer table header.
- 3: Retainer table row.
- 4: Add Paid Advertising button in the Referral table header.
- 5: Add Other Referral button in the Referral table header.
- 6: Add Referring Attorney button in the Referral table header.
- 7: Paid Advertising table row.
- 8: Other Referrals table row.
- 9: Attorney Referrals table row.
- 10: Add Referred Out Attorney button in the Refer Out/Sub Out table header.
- 11: Add Sub Out Attorney button in the Refer Out/Sub Out table header.
- 12: Add Workers Compensation Attorney button in the Refer Out/Sub Out table header.
- 13: Select Refer-Out Firm button in the Refer Out/Sub Out table header.
- 14: Add Prior Attorney button in the Refer Out/Sub Out table header.
- 15: Refer Out table row.
- 16: Sub Out table row.
- 17: Workers' Compensation table row.
- 18: Prior Attorney table row.

1. Recovered Client checkbox. Indicates whether a client in this case is again represented by the firm after an interval in which the client was no longer represented by the firm. Click the checkbox to change it from selected to deselected or vice versa.
2. Add Retainer button. Used to add a new retainer to the case file. See [Adding a Retainer](#).
3. Retainer table. Contains the retainer details and allows various actions to be performed on them. See [Retainer Table](#).
4. Add Paid Advertising button. Used to add new paid advertising to the case file. See [Adding Paid Advertising](#).
5. Add Other Referral button. Used to add a referral from a source other than an attorney or a paid advertisement to the case file. See [Adding Other Referrals](#).
6. Add Referring Attorney button. Used to add a referral from an attorney to the case file. See [Adding an Attorney Referral](#).
7. Paid Advertising table. Contains the paid advertising details and allows various actions to be performed on them. See [Paid Advertising Table](#).
8. Other Referrals table. Contains the details of other referrals and allows various actions to be performed on them. See [Other Referrals Table](#).
9. Attorney Referrals table. Contains the details of attorney referrals and allows various actions to be performed on them. See [Attorney Referrals Table](#).
10. Add Referred Out Attorney button. Used to add a referral out to another law firm, a new co-counsel firm, or a client-instigated substitution in favor of another firm. See [Adding a Referral Out](#).
11. Add Sub Out Attorney button. Used to add a substitution of attorney in favor of your firm. See [Adding a Substitution](#).
12. Add Workers Compensation Attorney button. Used to add a workers' compensation referral to another law firm. See [Adding a Workers' Compensation Referral Out](#).
13. Select Refer-Out Firm button. Used to add a referral out to another law firm according to your firm's refer-out rules. See [Adding a Referral Out](#).
14. Add Prior Attorney button. Used to add an attorney who worked on the case prior to the time it reached your firm. See [Adding a Prior Attorney](#).
15. Refer Out table. Contains the details of firms that have taken on part or all of the case and allows various actions to be performed on them. See [Refer Out Table](#).
16. Sub Out table. Contains the details of substitutions of attorney in favor of your firm and allows various actions to be performed on them. See [Sub Out Table](#).
17. Workers' Compensation table. Contains the details of workers' compensation referrals and allows various actions to be performed on them. See [Workers' Compensation Table](#) (<http://saweb/help/Content/Case%20Pages/General/RetainerReferral.htm#Workers>).
18. Prior Attorney table. Contains the details of prior attorneys and allows various actions to be performed on them. See [Prior Attorney Table](#).

Retainer Table

The Retainer table is where the details of retainers are stored. Each row of the table represents an individual retainer. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Retainer table contains the following columns:

The screenshot shows the Retainer table with the following columns highlighted by red circles:

- 1: Plaintiff Name
- 2: Retainer
- 3: Statement
- 4: Closing Statement
- 5: Fee
- 6: Documents
- 7: Comments
- 8: Action

1. Plaintiff Name: The plaintiff to whom the retainer applies.
2. Retainer: The details of the retainer (the retainer number and the dates the retainer was sent, received, and signed).
3. Statement: The dates the retainer statement was sent and received.
4. Closing Statement: The details of the closing statement (the closing retainer number and the dates the closing statement was sent and received).
5. Fee: The firm's fee (whether it be an absolute amount or a portion of recovery), and the amount advanced by the plaintiff.
6. Comments: Any comments about the retainer
7. Action: [Edit icon](#), [Delete icon](#)

Editing a Retainer

To edit a retainer:

1. Click the [Edit icon](#) in the Action column of the row representing the retainer you wish to edit. This will bring up an Add/Edit panel for retainers, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Retainer Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Retainer

To delete a retainer:

1. Click the [Delete icon](#) in the Action column of the row representing the retainer you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the retainer, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Retainer

To add a new retainer:

1. Click the Add Retainer button. This will bring up an Add/Edit panel for retainers, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Retainer Panel](#) for details about the fields.
3. Click Save to save the retainer and close the panel.
 - If you decide you do not wish to save the retainer, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Retainer Panel

The Add/Edit Retainer Panel allows you to fill in the details of a retainer. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Retainer' panel with the following fields and callouts:

- 1. Plaintiff Name: All
- 2. Retainer #: 123586
- 3. Retainer Sent: 10/21/2015
- 4. Retainer Received: 10/21/2015
- 5. Retainer Signed: / /
- 6. Retainer Executed: / /
- 7. Statement Sent: / /
- 8. Statement Received: / /
- 9. Closing Statement Sent: / /
- 10. Closing Statement Received: / /
- 11. Closing Retainer #:
- 12. Retainer Fee: Percentage (selected)
- 13. Fee Structure: /
- 14. Gross (selected)
- 15. Retainer Amount: \$10,000.00
- 16. Advance By Plaintiff: /
- 17. Attorney Fee Agreement: []
- 18. Comments: If matter is resolved through negotiation or agreement prior to litigation
- 19. Related Documents: Select
- 20. None of the Documents were selected

Created at 7/5/2017 2:25:00 PM by Simpson, Claude, Esq.
Modified at 2/23/2018 1:35:00 PM by Simpson, Claude, Esq.

Save Cancel

1. Plaintiff Name: The plaintiff to whom the retainer applies.
2. Retainer #: The identification number of the retainer.
3. Retainer Sent: The date the retainer was sent to the client.
4. Retainer Received: The date the retainer was received from the client.
5. Retainer Signed: The date the retainer was signed by the client.
6. Statement Sent: The date the retainer statement was sent.
7. Statement Received: The date the retainer statement was received.
8. Closing Statement Sent: The date the closing statement was sent.
9. Closing Statement Received: The date the closing statement was received.
10. Closing Retainer #: The identification number of the closing retainer.
11. Retainer Fee: A radio button allowing a choice regarding whether the fee is calculated as a percentage of the total recovery or as an absolute amount.
12. Fee Structure: The percentage or fraction that represents the fee as a portion of the total recovery. This field is uneditable and unused unless Retainer Fee is set to Percentage. If this field is left blank when changes are saved, Retainer Fee will be automatically reset to Amount.
13. Retainer Amount: The amount of the retainer fee.

14. Advance By Plaintiff: The amount of advance payment to the firm by the plaintiff.
15. Attorney Fee Agreement: Whether a formal fee agreement has been entered into.
16. Comments: Any comments about the retainer.

Paid Advertising Table

The Paid Advertising table is where the details of paid advertising that generated the case lead are stored. Each row of the table represents an individual contact running your paid advertisements. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Paid Advertising table contains the following columns:

| Plaintiff Name | Advertising Source | Sub Type | Advertising Date & Time | Comments | Action |
|--|--|--|---|------------------------------------|------------------------------------|
| All 1 | Smart Litigator 2 | Periodicals 3 | 12/18/2017 12:00:00 AM 4 | 5 | 6 |

1. Plaintiff Name: The plaintiff that contacted your firm because of the advertisement.
2. Advertising Source: The contact running the advertisement.
3. Sub Type: The medium in which the advertisement was placed.
4. Advertising Date & Time: The date and time the plaintiff viewed the advertisement.
5. Comments: Any comments about the advertising.
6. Action: An [Edit icon](#), and a [Delete icon](#).

Editing Paid Advertising

To edit paid advertising:

1. Click the [Edit icon](#) in the Action column of the row representing the paid advertising you wish to edit. This will bring up an Add/Edit panel for paid advertising, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Paid Advertising Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Paid Advertising

To delete paid advertising:

1. Click the [Delete icon](#) in the Action column of the row representing the paid advertising you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the paid advertising, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Paid Advertising

To add new paid advertising:

1. Click the Add Paid Advertising button. This will bring up an Add/Edit panel for paid advertising, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Paid Advertising Panel](#) for details about the fields.
3. Click Save to save the paid advertising and close the panel.
 - If you decide you do not wish to save the paid advertising, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Paid Advertising Panel

The Add/Edit Paid Advertising Panel allows you to fill in the details of paid advertising. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Advertising
✖

Plaintiff Name: 1

Advertising Source: 2

Sub Type: 3

Advertising Date & Time: 4

Comments: 5

Created at 10/21/2015 1:07:00 PM by Admin, A..
Modified at 3/16/2018 11:31:00 AM by Dreier, Harry.
Save
Cancel

1. Plaintiff Name: The plaintiff who contacted your firm because of the advertisement.
2. Advertising Source: The contact running the advertisement.
3. Sub Type: The medium in which the advertisement ran.
4. Advertising Date & Time: The date and time the plaintiff viewed the advertisement.
5. Comments: Any comments about the advertising.

Other Referrals Table

The Other Referrals table is where the details of "other" referrals, those coming from a source other than an attorney or a paid advertisement, are stored. Each row of the table represents an individual referral. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Other Referrals table contains the following columns:

| Plaintiff Name | Other Referral Name | Relationship To Firm | Primary/Secondary | Received Date | Comments | Action |
|----------------|---------------------|----------------------|-------------------|---------------|----------|--------|
| All | Smart Litigator | Business Associate | Primary | 1/15/2018 | | |

1. Plaintiff Name: The plaintiff who contacted your firm because of the referral.
2. Other Referral Name: The contact that made the referral.
3. Relationship To Firm: How the referring contact is related to the firm (e.g. former client, expert, etc.).
4. Primary/Secondary: Whether the referral was directly to your firm, or led indirectly to the plaintiff contacting your firm.
5. Received Date: The date the plaintiff received the referral.
6. Comments: Any comments about the referral.
7. Action: An [Edit icon](#), and a [Delete icon](#).

Editing Other Referrals

To edit other referrals:

1. Click the [Edit icon](#) in the Action column of the row representing the referral you wish to edit. This will bring up an Add/Edit panel for other referrals, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Other Referral Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Other Referrals

To delete other referrals:

1. Click the [Delete icon](#) in the Action column of the row representing the referral you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the referral, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Other Referrals

To add a new other referral:

1. Click the Add Other Referral button. This will bring up an Add/Edit panel for other referrals, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Other Referral Panel](#) for details about the fields.
3. Click Save to save the referral and close the panel.
 - If you decide you do not wish to save the referral, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Other Referral Panel

The Add/Edit Other Referral Panel allows you to fill in the details of other referrals. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows a window titled "Edit Other Referral" with the following fields and callouts:

- 1. Plaintiff Name: A dropdown menu currently showing "All".
- 2. Other Referral Name: A text input field containing "Robinson, A. Seth".
- 3. Relationship To Firm: A dropdown menu currently showing "Current Client".
- 4. Primary/Secondary: A dropdown menu currently showing "Primary".
- 5. Received Date: A date input field containing "01/15/2018".
- 6. Comments: A large text area for entering notes.

At the bottom of the panel are "Save" and "Cancel" buttons.



1. Plaintiff Name: The plaintiff who contacted your firm because of the referral.
2. Other Referral Name: The contact that made the referral.
3. Relationship To Firm: How the referring contact is related to the firm (e.g. former client, expert, etc.).
4. Primary/Secondary: Whether the referral was directly to your firm, or led indirectly to the plaintiff contacting your firm.
5. Received Date: The date the plaintiff was referred to your firm.
6. Comments: Any comments about the referral.

Attorney Referrals Table

The Attorney Referrals table is where the details of referrals by attorneys are stored. Each row of the table represents an individual referral. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Attorney Referrals table contains the following columns:

| Plaintiff Name | Referring Attorney | Fee Agreement | Referral Fee | Retainer | Disbursement | Comments | Action |
|----------------|--|--|--------------|--|--|----------|---|
| 1 | 2 Law Firm: Cavitt & Adams, LLP Attorney: Arcane, Clark Firm: 18-8520 | 3 Sent: 11/6/2017 Received: 11/29/2017 | 4 L/D | 5 Number: 12345 We are using this Retainer: No | 6 Amount: \$1235.60 Reimbursed: No | 7 | 8   |

1. Plaintiff Name: The plaintiff who contacted your firm because of the referral.
2. Referring Attorney: The details of the referral (the referring law firm, attorney, and file number).
3. Fee Agreement: The dates that the fee agreement was sent and received.
4. Referral Fee: The fee to be paid to the referring attorney (whether it be an absolute amount or a portion of the firm fee).
5. Retainer: The identification number of the referring attorney's retainer and whether your firm is using that retainer.
6. Disbursement: The referring attorney's total disbursements on the case and whether your firm has reimbursed the referring attorney.
7. Comments: Any comments about the referral.
8. Action: An [Edit icon](#) and a [Delete icon](#).

Editing an Attorney Referral

To edit an attorney referral:

1. Click the [Edit icon](#) in the Action column of the row representing the referral you wish to edit. This will bring up an Add/Edit panel for attorney referrals, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Attorney Referral Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Attorney Referral

To delete an attorney referral:

1. Click the [Delete icon](#) in the Action column of the row representing the referral you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the referral, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Attorney Referral

To add a new attorney referral:

1. Click the Add Referring Attorney button. This will bring up an Add/Edit panel for attorney referrals, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Attorney Referral Panel](#) for details about the fields.
3. Click Save to save the referral and close the panel.
 - If you decide you do not wish to save the referral, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Attorney Referral Panel

The Add/Edit Attorney Referral Panel allows you to fill in the details of an attorney referral. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Referring Attorney' panel with the following fields and callouts:

- 1: Plaintiff Name (dropdown menu)
- 2: Referring Law Firm (dropdown menu)
- 3: Referring Attorney (dropdown menu)
- 4: Referring File# (text input)
- 5: Fee Agreement Sent (date dropdown)
- 6: Fee Agreement Received (date dropdown)
- 7: Referral Fee (radio buttons for Percentage and Amount)
- 8: Percentage (dropdown menu)
- 9: Amount (text input)
- 10: Retainer # (text input)
- 11: Are we using referring attorney's retainer? (dropdown menu)
- 12: Disbursement (text input)
- 13: Reimbursed? (dropdown menu)
- 14: Comments (text area)

At the bottom, it shows: Created at 8/21/2017 12:49:00 PM by Simpson, Claude, Esq., Modified at 3/16/2018 10:40:00 AM by Dreier, Harry. There are Save and Cancel buttons.

1. Plaintiff Name: The plaintiff who contacted your firm because of the referral.
2. Referring Law Firm: The law firm that made the referral.
3. Referring Attorney: The attorney who made the referral. If there is a contact in the Referring Law Firm field, the dropdown will only show attorneys employed by that contact. Click the Show All button to make the dropdown show all attorneys. (Once you have done so, you can click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the referring law firm.)
4. Referring File#: The referring attorney's file number for the case.
5. Fee Agreement Sent: The date the fee agreement was sent.
6. Fee Agreement Received: The date the fee agreement was received.
7. Referral Fee: Whether the referral fee is calculated as a percentage of the firm's fee or as an absolute amount.
8. Percentage: The percentage or fraction that represents the referral fee as a portion of the firm's fee. This field is uneditable and unused unless Referral Fee is set to Percentage. If this field is left blank when changes are saved, Referral Fee will be automatically reset to Amount.
9. Amount: The amount of the referral fee. This field is uneditable and unused unless Referral Fee is set to Amount.
10. Retainer #: The identification number of the referring attorney's retainer.
11. Are we using[...]: Whether your firm is using the referring attorney's retainer.
12. Disbursement: The referring attorney's total disbursements on the case.
13. Reimbursed?: Whether your firm has reimbursed the referring attorney.
14. Comments: Any comments about the referral.

Refer Out Table

The Refer Out table is where the details of firms that have taken on part or all of the case are stored. Each row of the table represents an individual referral out (or addition of co-counsel, or substitution). See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Refer Out table contains the following columns:

| Plaintiff Name | Refer Out Attorney | Refer Type | Dates | Fee | Comment | Action |
|----------------|--|-----------------|---|-------------|---------|--------|
| All | Law Firm: Gotler & Thatcher, PLLC Attorney: Palmara, Jennifer | Client Selected | Client Contact Date: 1/8/2018 Referred Out Date: 1/15/2018 Acceptance Date: 1/18/2018 | Amount: 1/3 | | |

1. Plaintiff Name: The plaintiff effected by the referral out.
2. Refer Out Attorney: The details of the referral out (the law firm and attorney that have taken on the case, and the attorney's file number for the case).
3. Dates: Dates relevant to the referral out (the date the attorney contacted the plaintiff, the date the referral out occurred, the date the attorney accepted the case, the date the attorney rejected the case, and the date the attorney's retainer was signed).
4. Refer Type: Whether the attorney took on the case because your firm referred the case, your firm took the attorney on as co-counsel, or the client substituted the attorney in for your firm.
5. Fee: The fee associated with the referral out (whether it be an absolute amount or a portion of the total fee) and the date the fee was paid.
6. Comment: Any comments about the referral out.
7. Action: An [Edit icon](#) and a [Delete icon](#).

Editing a Referral Out

To edit a referral out:

1. Click the [Edit icon](#) in the Action column of the row representing the referral you wish to edit. This will bring up an Add/Edit panel for referrals out, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Referral Out Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Referral Out

To delete a referral out:

1. Click the [Delete icon](#) in the Action column of the row representing the referral you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the referral, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Referral Out

There are two different ways to add a new referral out. One is more heavily integrated with the SmartAdvocate system, requiring that you have set up refer-out rules for your case types, but also automatically sending an email about the referral; this method can only be used for full referrals. The other is a more basic approach that does not trigger any automatic actions, but can also be used for additions of co-counsel and substitutions.

To add a new referral using the more integrated method:

1. Make sure you have set up your firm's refer-out rules. See the [Refer-Out Rules](#) administrative page for instructions on how to set the rules up.
2. Click the Select Refer-Out Firm button. This will bring up a panel for selecting the firm to refer the case out to. See The Select Refer-Out Firm Panel for details about the fields
3. The state in the Case State field will match the state the case is located in, but if you wish to choose a firm based on the refer-out rules for a different state, select that state; otherwise, leave the field as is.
4. Select the firm you wish to refer the case to from the Law Firms table. This will bring up the comments associated with that firm in the Comments area.
5. Click the Continue button to choose the selected firm. This will bring up the Case Email panel, using the Referral Summary email template.
 - If you decide you do not want to add the referral, click Cancel instead of clicking Continue to cancel the addition and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
6. Make any edits you wish to make to the email, then click Send to send it. This will also close the open panels, and add a new referral with the law firm and referral date already input according to your selection, the type set to Referred Out, and the fee amount set to \$0. (You may need to edit the new referral to fill in or fix some details.)
 - If you decide you do not want to send the email, click the white X at the upper right of the Case Email panel to close it. This will not close the Select Refer-Out Firm Panel, nor will it finish adding the new referral. It will only revert you to the previous step in these instructions.

To add a new referral (or co-counsel, or a substitution) using the basic approach:

1. Click the Add Referred Out Attorney button. This will bring up an Add/Edit panel for referrals out, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Referral Out Panel](#) for details about the fields.
3. Click Save to save the referral and close the panel.
 - If you decide you do not wish to save the referral, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Referral Out Panel

The Add/Edit Referral Out Panel allows you to fill in the details of a referral out. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Referred Out' panel with the following fields and callouts:

- 1. Type: Radio buttons for Referred Out, Co-Counsel Out, and Client Selected.
- 2. Plaintiff Name: Dropdown menu.
- 3. Refer Out Law Firm: Dropdown menu.
- 4. Refer Out Attorney: Dropdown menu.
- 5. Client Contact Date: Date picker.
- 6. Their Case #: Text input field.
- 7. Ref/Co-Counsel Out Date: Date picker.
- 8. Acceptance Date: Date picker.
- 9. Rejection Date: Date picker.
- 10. Are they using our Retainer?: Radio buttons for Yes and No.
- 11. Retainer Date: Date picker.
- 12. Fee Split Sent: Date picker.
- 13. Fee Split Received: Date picker.
- 14. Confirmation Letter Sent: Date picker.
- 15. Letter Received: Date picker.
- 16. Is Fee Paid?: Radio buttons for Yes and No.
- 17. Paid Date: Date picker.
- 18. Fee: Radio buttons for Percentage/Fraction and Amount.
- 19. Fee value: Input field showing 1/3.
- 20. Fee amount: Input field.
- 21. Comment: Text area.

1. Type: Whether the attorney took on the case because your firm referred the case, your firm took the attorney on as co-counsel, or the client substituted the attorney in for your firm.
2. Plaintiff Name: The plaintiff affected by the referral out.
3. Refer Out Law Firm: The law firm that has taken on the case.

4. Refer Out Attorney: The attorney who has taken on the case. If there is a contact in the Refer Out Law Firm field, the dropdown will only show attorneys employed by that contact. Click the Show All button to make the dropdown show all attorneys. (Once you have done so, you can click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the referring law firm.)
5. Client Contact Date: The date the attorney contacted the plaintiff.
6. Their Case #: The attorney's file number for the case.
7. Ref/Co-Counsel Out Date: The date the referral out occurred.
8. Acceptance Date: The date the attorney accepted the case.
9. Rejection Date: The date the attorney rejected the case.
10. Are they using our Retainer?: Whether the attorney is using your firm's retainer.
11. Retainer Date: The date the attorney's retainer was signed.
12. Fee Split Sent: The date the fee split agreement was sent.
13. Fee Split Received: The date the fee split agreement was received.
14. Confirmation Letter Sent: The date a letter confirming the new representation was sent.
15. Letter Received: The date a letter confirming the new representation was received.
16. Is Fee Paid?:
17. Paid Date: Whether the fee associated with the referral out has been paid.
18. Fee: Whether the fee associated with the referral out is calculated as a percentage of the total fee or as an absolute amount.
19. Percentage/Fraction: The percentage or fraction that represents the fee associated with the referral out as a portion of the total fee. This field is uneditable and unused unless Fee is set to Percentage/Fraction. If this field is left blank when changes are saved, Fee will be automatically reset to Amount.
20. Amount: The amount of the fee associated with the referral out. This field is uneditable and unused unless Fee is set to Amount.
21. Comment: Any comments about the referral out.

Sub Out Table

The Sub Out table is where the details of substitutions of attorney in favor of your firm are stored. Each row of the table represents an individual substitution. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Sub Out table contains the following columns:

| Plaintiff Name | Sub Out Attorney | Sub Out | Disbursement | Fee | Comment | Action |
|----------------|---|--|-------------------------------------|---------------|---------|---|
| All | Law Firm: The Offices of Bialystock + Bloom, LLP (Chicago Office) Attorney: Givens, Raylan | Date: 1/25/2018 Method: Regular Mail Letter Date: 1/25/2018 File Transferred: 1/29/2018 | Amount: \$450.00 Paid: 1/29/2018 | 1/3 of Amount | |   |

1. Plaintiff Name: The plaintiff effected by the substitution.
2. Sub Out Attorney: The details of the attorney being substituted for (the law firm and attorney that were substituted for, and the attorney's file number for the case).
3. Sub Out: The details of the substitution (the date the substitution was made, the method of serving the notice of substitution, the date the letter of substitution was sent, and the date the case file was transferred to your firm).
4. Disbursement: The amount of the attorney's disbursements on the case and the date the attorney was reimbursed.
5. Fee: The fee of the attorney being substituted for (whether as an absolute amount or as a portion of the total fee), the date the fee was paid, and the date of the court order mandating payment.
6. Comment: Any comments about the substitution.
7. Action: An [Edit icon](#) and a [Delete icon](#).

Editing a Substitution

To edit a substitution of attorney:

1. Click the [Edit icon](#) in the Action column of the row representing the substitution you wish to edit. This will bring up an Add/Edit panel for substitutions, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Substitution Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Substitution

To delete a substitution of attorney:

1. Click the [Delete icon](#) in the Action column of the row representing the substitution you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the substitution, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Substitution

To add a new substitution of attorney:

1. Click the Add Sub Out Attorney button. This will bring up an Add/Edit panel for substitutions, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Substitution Panel](#) for details about the fields.
3. Click Save to save the substitution and close the panel.
 - If you decide you do not wish to save the substitution, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Substitution Panel

The Add/Edit Substitution Panel allows you to fill in the details of a substitution. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Sub Out' form with the following fields and callouts:

- 1. Plaintiff Name: All
- 2. Sub Out Law Firm: Dewey Cheatem & Howe
- 3. Sub Out Attorney: Cheatem, Wesure D.
- 4. File #: [Empty]
- 5. Sub-Out Date: 02/26/2018
- 6. Sub-Out Method: Regular Mail
- 7. Sub-Out Letter Date: 03/05/2018
- 8. Disb. Paid: 03/20/2018
- 9. Disb. Amount: \$815.00
- 10. File Transferred: 03/20/2018
- 11. Comment: [Empty text area]
- 12. Send Letters: Defendants, Defendant Insurance Co., Defendant Attorneys, Lien Holders (all checked)
- 13. Is Prior Attorney Entitled To Fee?: Yes
- 14. Fee Amount Agreed: [Checked]
- 15. Percentage: [Empty]
- 16. Amount: [Empty]
- 17. Is Fee to be paid at closure of case?: [Checked]
- 18. Date Paid: [Empty]
- 19. Check #: [Empty]
- 20. Is fee to be decided at the end of case?: [Checked]
- 21. Stipulation Date: [Empty]
- 22. Court Order Date: [Empty]
- 23. Who is moving for court order?: [Empty]
- 24. Other: [Empty]

Created at 3/16/2018 10:49:00 AM by Dries: Harry. Save Cancel

1. Plaintiff Name: The plaintiff affected by the substitution.
2. Sub Out Law Firm: The law firm that was substituted for.
3. Sub Out Attorney: The attorney who was substituted for. If there is a contact in the Sub Out Law Firm field, the dropdown will only show attorneys employed by that contact. Click the Show All button to make the dropdown show all attorneys. (Once you have done so, you can click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the referring law firm.)
4. File #: The attorney's file number for the case.
5. Sub-Out Date: The date the substitution was made.
6. Sub-Out Method: The method of serving the notice of substitution.
7. Sub-Out Letter Date: The date the letter of substitution was sent.
8. Disb. Paid: The date the attorney was reimbursed for disbursements.
9. Disb. Amount: The amount of the attorney's disbursements on the case.
10. File Transferred: The date the case file was transferred to your firm.
11. Comment: Any comments about the substitution.
12. [Send Letters] Defendants, Defendant Insurance Co., Defendant Attorneys, Lien Holders: Whether a letter has been sent to the defendants, Defendant Insurance Co., Defendant Attorneys, and/or Lien Holders notifying them of the substitution.
13. Is Prior Attorney Entitled To Fee?: Whether the attorney who was substituted for is entitled to a fee.
14. Fee Amount Agreed: Whether the amount of the fee due to the prior attorney has been formally agreed to or not. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes.
15. Percentage: The percentage or fraction that represents the fee due to the prior attorney as a portion of the firm's fee. This field is uneditable and unused unless the promptless field is set to Percentage. If this field is left blank when changes are saved, the promptless field will be automatically reset to Amount. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes, and Fee Amount Agreed is selected.
16. Amount: The amount of the fee due to the prior attorney as a portion of the firm's fee. This field is uneditable and unused unless the promptless field is set to Amount. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes, and Fee Amount Agreed is selected.
17. Is Fee to be paid at closure of case?: Whether the fee due to the prior attorney will be paid after the conclusion of the case. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes.
18. Date Paid: The date that the fee due to the prior attorney was paid. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes.
19. Check #: The number of the check used to pay the fee due to the prior attorney. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes.
20. Is fee to be decided at the end of case?: Whether the amount of the fee due to the prior attorney will be decided at the end of the case. This field does not appear unless Is Prior Attorney Entitled To Fee? is blank or set to Yes.
21. Stipulation Date: The date of the stipulation determining the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.
22. Court Order Date: The date of the court order determining the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.
23. Who is moving for court order?: The party that made the motion for a court order to determine the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.
24. Other: The date of any other means of determining the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.

Workers' Compensation Table

The Workers' Compensation table is where the details of referrals of workers' compensation claims out to workers' compensation attorneys are stored. Each row of the table represents an individual referral. See Tables for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Workers' Compensation table contains the following columns:

| Plaintiff Name | Workers Compensation Attorney | Dates | Fee | Comment | Action |
|----------------|---|--|----------------------|----------|----------|
| All 1 | Law Firm: The Offices of Bialystock & Bloom, LL* (Headquarters) Attorney: Bloom, Leo 2 | Client Contact Date: 1/17/2018 Co-Counsel Out Date: 1/15/2018 Acceptance Date: 1/17/2018 Retainer Date: 12/12/2017 3 | Amount: 1/3 4 | 5 | 6 |

1. Plaintiff Name: The plaintiff affected by the referral out.
2. Workers Compensation Attorney: The details of the referral out (the workers' compensation law firm and attorney, and the attorney's file number for the case).
3. Dates: Dates relevant to the referral out (the date the attorney contacted the plaintiff, the date the referral out occurred, the date the attorney accepted the case, the date the attorney rejected the case, and the date the attorney's retainer was signed).
4. Fee: The fee associated with the referral out (whether it be an absolute amount or a portion of the total fee) and the date the fee was paid.
5. Comment: Any comments about the referral out.
6. Action: An [Edit icon](#) and a [Delete icon](#).

Editing a Workers' Compensation Referral Out

To edit a workers' compensation referral out:

1. Click the [Edit icon](#) in the Action column of the row representing the referral out you wish to edit. This will bring up an Add/Edit panel for workers' compensation referrals out, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Workers' Compensation Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Workers' Compensation Referral Out

To delete a workers' compensation referral out:

1. Click the [Delete icon](#) in the Action column of the row representing the referral you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the referral, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Workers' Compensation Referral Out

To add a new workers' compensation referral out:

1. Click the Add Workers Compensation Attorney button. This will bring up an Add/Edit panel for workers' compensation referrals out, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Workers' Compensation Panel](#) for details about the fields.
3. Click Save to save the referral and close the panel.
 - If you decide you do not wish to save the referral, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Workers' Compensation Panel

The Add/Edit Workers' Compensation Panel allows you to fill in the details of a workers' compensation referral out. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Workers Compensation' panel with the following fields and callouts:

- 1: Plaintiff Name dropdown menu.
- 2: Workers Compensation Law Firm dropdown menu.
- 3: Workers Compensation Attorney dropdown menu.
- 4: Their Case # text input field.
- 5: Referred Out Date date picker.
- 6: Client Contact Date date picker.
- 7: Acceptance Date date picker.
- 8: Rejection Date date picker.
- 9: Are they using our Retainer? radio button.
- 10: Retainer Date date picker.
- 11: Fee Split Sent dropdown menu.
- 12: Fee Split Received dropdown menu.
- 13: Confirmation Letter Sent dropdown menu.
- 14: Letter Received dropdown menu.
- 15: Is Fee Paid? dropdown menu.
- 16: Paid Date date picker.
- 17: Fee radio button (Percentage/Fraction).
- 18: Fee input field (showing 1/3).
- 19: Fee radio button (Amount).
- 20: Comment text area.

Buttons for 'Save' and 'Cancel' are located at the bottom of the panel.

1. Plaintiff Name: The plaintiff effected by the referral out.
2. Workers Compensation Law Firm: The law firm to which the workers' compensation claim was referred.
3. Workers Compensation Attorney: The attorney to whom the workers' compensation claim was referred. If there is a contact in the Workers Compensation Law Firm field, the dropdown will only show attorneys employed by that contact. Click the Show All button to make the dropdown show all attorneys. (Once you have done so, you can click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the referring law firm.)
4. Their Case #: The attorney's file number for the case.
5. Referred Out Date: The date the referral out occurred.
6. Client Contact Date: The date the attorney contacted the plaintiff.
7. Acceptance Date: The date the attorney accepted the case.
8. Rejection Date: The date the attorney rejected the case.
9. Are they using our Retainer?: Whether the attorney is using your firm's retainer.
10. Retainer Date: The date the attorney's retainer was signed.
11. Fee Split Sent: The date the fee split agreement was sent.
12. Fee Split Received: The date the fee split agreement was received.
13. Confirmation Letter Sent: The date a letter confirming the new representation was sent.
14. Letter Received: The date a letter confirming the new representation was received.
15. Is Fee Paid?: Whether the fee associated with the referral out has been paid.
16. Paid Date: The date the fee associated with the referral out was paid.
17. Fee: Whether the fee associated with the referral out is calculated as a percentage of the total fee or as an absolute amount.
18. Percentage/Fraction: The percentage or fraction that represents the fee associated with the referral out as a portion of the total fee. This field is uneditable and unused unless Fee is set to Percentage/Fraction. If this field is left blank when changes are saved, Fee will be automatically reset to Amount.
19. Amount: The amount of the fee associated with the referral out. This field is uneditable and unused unless Fee is set to Amount.
20. Comment: Any comments about the referral out.

Prior Attorney Table

The Prior Attorney table is where the details of attorneys who worked on the case prior to the time it reached your firm are stored. Each row of the table represents an individual attorney. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Prior Attorney table contains the following columns:

| Plaintiff Name | Prior Attorney | Sub Out | Disbursement | Comments | Action |
|----------------|--|--|--|----------|----------|
| All 1 | Law Firm: Dewey Cheatem & Howe Attorney: Cheatem, Wessire D. 2 | Date: 1/16/2018 Method: Regular Mail File Received: 2/19/2018 3 | Date: 2/12/2018 Amount: \$875.32 4 | 5 | 6 |

1. Plaintiff Name: The plaintiff formerly represented by the attorney.
2. Sub Out Attorney: The details of the prior attorney (the prior law firm and attorney, and the attorney's retainer number and file number for the case).
3. Sub Out: The details of the change in attorneys (the date the change was made, the method of serving the notice of substitution, and the date the case file was received by your firm).
4. Disbursement: The date the attorney was reimbursed for disbursements on the case and the amount of the disbursements.
5. Comments: Any comments about the prior attorney.
6. Action: An [Edit icon](#) and a [Delete icon](#).

Editing a Prior Attorney

To edit a prior attorney:

1. Click the [Edit icon](#) in the Action column of the row representing the attorney you wish to edit. This will bring up an Add/Edit panel for prior attorneys, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Prior Attorney Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Prior Attorney

To delete a prior attorney:

1. Click the [Delete icon](#) in the Action column of the row representing the attorney you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the attorney, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Prior Attorney

To add a new prior attorney:

1. Click the Add Prior Attorney button. This will bring up an Add/Edit panel for prior attorneys, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Prior Attorney Panel](#) for details about the fields.
3. Click Save to save the attorney and close the panel.
 - If you decide you do not wish to save the attorney, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Prior Attorney Panel

The Add/Edit Prior Attorney Panel allows you to fill in the details of a prior attorney. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

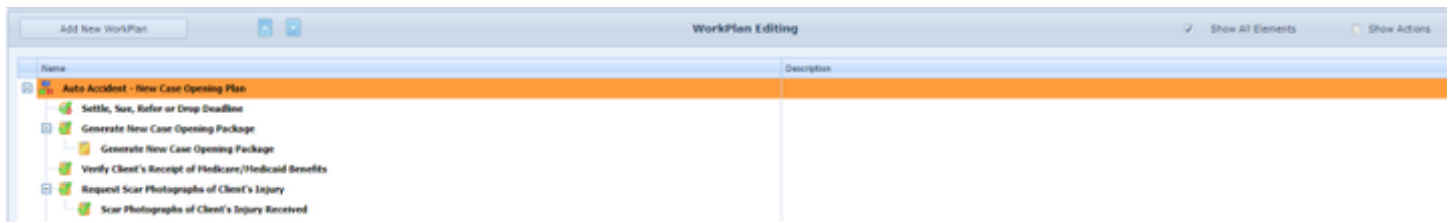
The screenshot shows the 'Edit Prior Attorney' panel with the following fields and their corresponding callout numbers:

- 1: Plaintiff Name (dropdown menu)
- 2: Prior Law Firm (dropdown menu)
- 3: Prior Attorney (dropdown menu)
- 4: Sub'd Date (date picker)
- 5: Sub Out Method (dropdown menu)
- 6: Disb. Paid (date picker)
- 7: Disb.Amount (text input)
- 8: Date File Received (date picker)
- 9: Referral? (dropdown menu)
- 10: Comments (text area)
- 11: Prior Retainer# (text input)
- 12: File # (text input)
- 13: Is Prior Attorney Entitled To Fee? (radio buttons)
- 14: Fee Amount Agreed (checkbox)
- 15: Percentage (dropdown menu)
- 16: Amount (text input)
- 17: Is Fee to be paid at conclusion of case? (checkbox)
- 18: Is Fee to be decided at the end of case? (checkbox)
- 19: Stipulation Date (date picker)
- 20: Court Order Date (date picker)
- 21: Other (date picker)
- 22: Who is moving for court order? (dropdown menu)

1. Plaintiff Name: The plaintiff affected by the substitution.
2. Prior Law Firm: The law firm that previously worked on the case.
3. Prior Attorney: The attorney who previously worked on the case.
4. Sub'd Date: The date the change in attorneys was made.
5. Sub Out Method: The method of serving the notice of substitution.
6. Disb. Paid: The date the attorney was reimbursed for disbursements.
7. Disb. Amount: The amount of the attorney's disbursements on the case.
8. Date File Received: The date the case file was received by your firm.
9. Referral?: Whether the case reached your firm through a direct or indirect referral.
10. Comments: Any comments about the prior attorney.
11. Prior Retainer#: The identification number of the prior attorney's retainer.
12. File #: The prior attorney's file number for the case
13. Is Prior Attorney Entitled To Fee?: Whether the prior attorney is entitled to a fee.
14. Fee Amount Agreed: Whether the amount of the fee due to the prior attorney has been formally agreed to. This field does not appear unless Is Prior Attorney Entitled To Fee? is set to Yes.
15. Percentage: The percentage or fraction that represents the fee due to the prior attorney as a portion of the firm's fee. This field is uneditable and unused unless the promptless field is set to Percentage. If this field is left blank when changes are saved, the promptless field will be automatically reset to Amount. This field does not appear unless Is Prior Attorney Entitled To Fee? is set to Yes, and Fee Amount Agreed is selected.
16. Amount: The amount of the fee due to the prior attorney. This field is uneditable and unused unless the promptless field is set to Amount. This field does not appear unless Is Prior Attorney Entitled To Fee? is set to Yes, and Fee Amount Agreed is selected.
17. Is Fee to be paid at conclusion of case?: Whether the fee due to the prior attorney will be paid after the conclusion of the case. This field does not appear unless Is Prior Attorney Entitled To Fee? is set to Yes.
18. Is fee to be decided at the end of case?: Whether the amount of the fee due to the prior attorney will be decided at the end of the case. This field does not appear unless Is Prior Attorney Entitled To Fee? is set to Yes.
19. Stipulation Date: The date of the stipulation determining the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.
20. Court Order Date: The date of the court order determining the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.
21. Other: The date of any other means of determining the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.
22. Who is moving for court order?: The party that made, or will make, the motion for a court order to determine the fee. This field does not appear if Is Prior Attorney Entitled To Fee? is set to Undecided.

WorkPlans

The WorkPlans page allows you to manage the WorkPlans in the case, including adding entire saved WorkPlans, editing individual WorkPlan items, and marking items completed. Because WorkPlan items may cause various actions in a case as soon as they become active in that case, it is recommended that you not manipulate individual WorkPlan items on this screen; the effects of doing so may not be expected or intended, or there may be no effect at all. It is generally better to prepare WorkPlans using the [WorkPlan Management](#) administrative page and related pages, then add them in their entirety either on this screen or using automatic rules set in the [WorkPlan Assignments](#) administrative page. There is at least one WorkPlan-related action that must be taken on this page, which is making a selection in Decision items; see [Decisions](#) in the [WorkPlan Editing](#) administrative page.



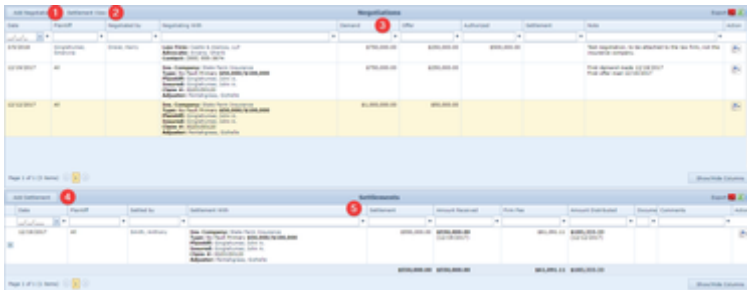
This page is structurally nearly identical to the [WorkPlan Editing](#) administrative page, and that page contains most of the essential information about using WorkPlans; there are only a few differences in this page:

1. You may add a new WorkPlan to the case by clicking the Add New WorkPlan button. Doing so will bring up a panel with a single dropdown field allowing you to select the previously prepared WorkPlan you wish to add to the case. Select the desired WorkPlan and click the Update button to add the WorkPlan to the case.
2. By default, inactive items in the WorkPlans in a case are not visible on this page. To make them visible, select the Show All Elements checkbox; doing so will make inactive items visible (their icons and names will be in grey to indicate that they are inactive) and open the entire hierarchical structure to show all of the items, active and inactive, in the WorkPlan. Deselecting the checkbox will make the inactive items invisible again.
3. You may mark items completed in the WorkPlan by right-clicking them and selecting Mark Completed. This is not recommended for appointment or task items, because those can be marked completed in the ordinary course of the case; marking an appointment completed in the [Calendar](#) also marks the corresponding WorkPlan appointment item completed, clicking the Mark Completed icon of a task in the Tasks area of the [Case Summary](#) marks the corresponding WorkPlan task item completed, and entering a Date Completed in a critical deadline also marks it as complete in the WorkPlan. However, Decision items can only be marked completed on this page.
4. If an item in the WorkPlan includes an action that is performed manually, you may cause that action to occur by right-clicking the action (the Show Actions checkbox must be selected for the action to be visible) and then clicking the Perform option of the menu that appears. You may repeat an action that has already been performed by repeating this process, though there should rarely be a reason to do so.

Negotiation/Settlement

The Negotiation/Settlement page allows you to view and record the details of negotiations and settlements with insurance companies and opposing counsel. Some of the information on this page is presented in a simplified format in the [Negotiations and Settlements](#) area of the [Case Summary](#) page, but the Negotiation/Settlement page contains much more thorough information, and is the only place where that information can be directly edited. Note that financial awards due to arbitration or verdicts are also recorded on this page in the Settlement table, even though they are not technically settlements. This manual will follow the convention of the SmartAdvocate system and use "settlement" to describe any outcome resulting in compensation for a plaintiff. To distinguish between actual settlements and other outcomes, use the Settlement Type field in [The Add/Edit Settlement Panel](#).

The Structure of This Page



1. Add Negotiation button. Used to add a new negotiation to the case file. See [Adding a Negotiation](#).
2. Settlement View button. Opens the Settlement View panel, which displays a summary of the case file for use in negotiations. See [Settlement View Panel](#).
3. Negotiation table. Contains the negotiation details and allows various actions to be performed on them. See [Negotiation Table](#).
4. Add Settlement button. Used to add a new settlement to the case file. See [Adding a Settlement](#).
5. Settlement table. Contains the settlement details and allows various actions to be performed on them. See [Settlement Table](#).

Settlement View Panel

The Settlement View panel provides an overview of the information in the case that is likely to be relevant during negotiations. The panel includes information from various other case pages in SmartAdvocate. To open the panel, click the Settlement View button. To close it, click the Close button or the white X in the upper right corner of the panel. The panel contains the following sections:

Settlement View

Plaintiff: Ginglehmer, John A. Ginglehmer, Smeryna Marks, Rodney **1**

Incident Facts: **2**
 NYC Police and Firefighters responded to reports of a traffic collision; involving a pedestrian being struck by a vehicle; at Avenue 52 X Grapefruit Boulevard in Manhattan. Police and Firefighters arrived on scene and confirmed one victim perished. The NYC Police Department (NYPD) is overseeing the investigation.

Injuries: **3**
 Amputation
 Displaced Fracture Surgery
 Adrenal Glands Contusion Tongue Cancer Antibiotic Therapy, Computed Axial Tomography, Ultrasound
 Hand Pain
 Head, Neck & Back Pain

Coverage: **4**

| Ins. Co. | Ins. Type | Adjuster | Insured Name | Policy Limit |
|----------------------|------------------|----------------------|--------------------|---------------------|
| GEICO | Collision | John Kramer | Mary Ripspeed | \$100,000/\$300,000 |
| GEICO | Health Insurance | | | \$0.00/\$0.00 |
| State Farm Insurance | No Fault Primary | Gizhelle Pentahgrass | John A. Ginglehmer | \$50,000/\$100,000 |

Lienors: **5**

| Lienor Name | Lienor Type | Lienor Amount | Comments |
|----------------------------------|-----------------|---------------|----------|
| Smart Utigator | Funding Company | \$1,500.00 | |
| GEICO | Medicaid | \$250.00 | |
| Doe, John | Doctor | \$12,000.00 | |
| Doe, John | Med Pay | \$1,000.00 | |
| Good Samaritan Memorial Hospital | Disability | \$0.00 | |

Disbursements: \$5,946.76 **6**

Last Demand: \$750,000 (12/19/2017) **7**

Last Offer: \$250,000 (12/19/2017) **8**

Close

1. Plaintiff: This section contains a [Radio button](#) field with an option for each plaintiff in the case. Select the plaintiff whose information you wish to see; all other sections show only the information pertaining to the selected plaintiff.
2. Incident Facts: This section contains the Incident Facts field from the [Incident](#) case page.
3. Injuries: This section contains information from the Injuries Summary column in a table with two segments taken from the [Injuries](#) case page. The first segment is taken from the Injuries Summary column of the Injuries Summary table; the second is taken from the Injury and Description columns of the Injury Details sub-table.
4. Coverage: This section contains a table with five columns taken from the Insurance Companies tables in the Plaintiff Insurance and Defendant Insurance case pages. The table excludes duplicate records and records from the Plaintiff Insurance page that cover a plaintiff other than the selected one, but it includes third-party administrators as separate rows. The Ins. Co. column is taken from the Insurance Company column of the source table (or the first line of the 3rd Party Insurance column for third-party administrators); the Ins. Type column is taken from the Insurance Type column; the Adjuster column is taken from the Adjuster line of the 3rd Party Insurance column for third-party administrators); the Insured Name is taken from the first line of the Policy Info column; and the Policy Limit column is taken from the Limits line of the Policy Info column for defendant insurance companies, or the UM/SUM Limits line of the Policy Info column for plaintiff insurance companies.
5. Lienors: This section contains a table with four columns taken from the [Lienor Table](#) on the [Lien Tracking](#) case page. The Lienor Name column is taken from the Lienor column of the source table; the Lienor Type column is taken from the Lienor Type column of the source table; the Lienor Amount column is taken from the Negotiated line of the Amounts column; and the Comments column is taken from the Comments column.
6. Disbursements: This section contains the number in the Total column for the selected plaintiff on the Disbursements case page.
7. Last Demand: This section contains the number in the Demand column of the Negotiation Page with the latest date in the Date field of all those that involve the plaintiff, ignoring those where the Demand column is blank or contains \$0.00.
8. Last Offer: This section contains the number in the Offer column of the Negotiation Page with the latest date in the Date field of all those that involve the plaintiff, ignoring those where the Offer column is blank or contains \$0.00.

Negotiation Table

The Negotiation table is where the details of negotiations are stored. Each row of the table represents an individual round of negotiation. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Negotiation table contains the following available columns:

| Date | Plaintiff | Negotiated by | Negotiating with | Demand | Offer | Authorized | Settlement | Note | Action |
|------------|---------------------|---------------|---|----------------|--------------|--------------|------------|--|--------|
| 3/5/2018 | Ginglehmer, Smeryna | Onico, Harry | Law Firm: Castle & Kilmos, LLP Advocate: Ariana, Oherik Contact: (555) 555-5674 | \$750,000.00 | \$250,000.00 | \$500,000.00 | | Test negotiation, to be attached to the law firm, not the insurance company. | |
| 12/19/2017 | All | | Ins. Company: State Farm Insurance Type: No Fault Primary \$50,000/\$100,000 Plaintiff: Ginglehmer, John A. Insured: Ginglehmer, John A. Claim #: 3020150120 Adjuster: Pentahgrass, Gizhelle | \$750,000.00 | \$250,000.00 | | | First demand made 12/18/2017 First offer made 12/19/2017 | |
| 12/12/2017 | All | | Ins. Company: State Farm Insurance Type: No Fault Primary \$50,000/\$100,000 Plaintiff: Ginglehmer, John A. Insured: Ginglehmer, John A. Claim #: 3020150120 Adjuster: Pentahgrass, Gizhelle | \$1,000,000.00 | \$50,000.00 | | | | |

1. Date: The date of the negotiation.
2. Plaintiff: The plaintiff whose settlement was being negotiated.

3. Staff: The staff member who conducted the negotiation.
4. Negotiating With: The details of the company being negotiated with (for insurance companies: the name of the company, insurance type, policy limits, relevant defendant or plaintiff, name of insured, claim number, and adjuster name and phone number; for law firms, the name of the firm and the attorney name (Advocate) and phone number).
5. Demand: The amount of the demand made by your firm during the negotiation.
6. Offer: The amount of the offer made by the insurance company or attorney during the negotiation.
7. Authorized: The amount the plaintiff authorized your firm to accept.
8. Settlement: The amount of the settlement reached during the negotiation.
9. Note: Any comments about the negotiation.
10. Action: Right-click icon; right-click menu contains Edit, Email, Delete, and Print.

Editing a Negotiation

To edit a negotiation:

1. Click the [right-click icon](#) in the Action column of the row representing the negotiation you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for negotiations, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Negotiation Panel](#) for details about the fields.
 4. Click Save (for a new Negotiation) or Update (if editing an existing Negotiation) to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - If you wish to email the details of the negotiation at the same time as you save the changes, click Save & Email or Update and Email instead of clicking Save or Update to save the changes, which will close the Add/Edit panel, and open the case email panel, using the **[Negotiation]** email template, with the details of the negotiation automatically included in place of negotiation merge codes. Fill out the email with any desired additional content and click Send to send the email, or click the white X at the upper right of the panel instead of clicking Send to close the panel without sending the email. See the [Email/Note Templates](#) administrative page for managing email templates.

Deleting a Negotiation

To delete a negotiation:

1. Make sure there is no settlement linked to the negotiation. If the Settlement column in the row representing the negotiation you wish to delete is not blank, there is a settlement linked to the negotiation. See [The Settlement Field](#) for details about linked settlements, and see [Deleting a Settlement](#) to first delete the settlement linked to the negotiation, if there is one.
 2. Click the [right-click icon](#) in the Action column of the row representing the negotiation you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 4. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the negotiation, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Negotiation

To add a new negotiation:

1. Click the Add Negotiation button. This will bring up an Add/Edit panel for negotiations, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Negotiation Panel](#) for details about the fields.
 3. Click Save to save the negotiation and close the panel.
- If you decide you do not wish to save the negotiation, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Emailing a Negotiation

To email the details of a negotiation:

1. Click the [right-click icon](#) in the untitled column of the row representing the negotiation whose details you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Email option in the menu. This will open the Case Email panel, using the **[Negotiation]** email template, with the details of the negotiation automatically included in place of negotiation merge codes.
 3. Fill out the email with any desired additional content. See the [Email/Note Templates](#) administrative page for managing email templates.
 4. Click Send to send the email.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Negotiation

To print the details of a negotiation:

1. Click the [right-click icon](#) in the untitled column of the row representing the negotiation whose details you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Print option in the menu. This will open a new tab containing only the details of the negotiation, and immediately bring up your browser's print options for that tab.
3. Select the print options you desire and print the negotiation details. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)

- Note that after printing, the tab containing only the details of the negotiation will remain open. You may close this if you wish.

The Add/Edit Negotiation Panel

The Add/Edit Negotiation Panel allows you to fill in the details of a negotiation. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Form' window for a negotiation. It includes a table of negotiating parties, a form for negotiation details, and a settlement calculation section. Red circles 1 through 10 highlight specific fields and sections.

| # | Insurance Co./Law Firm | Adjuster/Attorney | Phone | Insurance Type | Plaintiff/Defendant |
|---|------------------------|----------------------|----------------|------------------|---------------------|
| 1 | GEICO | Kramer, John | (909) 855-4678 | Collision | Ripstead, Mary |
| 2 | State Farm Insurance | Pentahgrass, Gizelle | | No Fault Primary | Gingelymet, John A. |
| 3 | GEICO | | | Health Insurance | Gingelymet, John A. |
| 4 | GEICO | | | Health Insurance | Markis, Rodney |
| 5 | Castle & Alamos, LLP | Arcana, Ghank | (555) 555-2674 | | Ripstead, Mary |

Form fields include: Date (12/19/2017), Authorized (\$500,000), Negotiated by (Drew, Harry), Plaintiff (A3), Demand (\$750,000), Offer (\$250,000), Settlement (\$0), and Settlement Calculation Based on the Offer (Net \$250,000.00).

1. Negotiating with: Radio buttons that allow you to choose the company or law firm being negotiated with.
2. Date: The date of the negotiation.
3. Negotiated by: The staff member who conducted the negotiation.
4. Plaintiff: The plaintiff whose settlement was being negotiated.
5. Authorized: The amount the plaintiff authorized your firm to accept.
6. Demand: The amount of the demand made by your firm during this negotiation.
7. Offer: The amount of the offer made by the company or law firm during the negotiation.
8. Settlement: The amount of the settlement reached during the negotiation. An exclamation mark () indicates that the data in this field is different from the data for this plaintiff in the Settlement table. For additional details, see The Settlement Field.
9. Note: Any comments about the negotiation.
10. Settlement Calculation Based on the Offer: This is a separate section of the Add/Edit Negotiation Panel, used to determine the approximate amount the plaintiff will receive based on a specific settlement amount. The information for most of the fields are taken from information in other pages in the system. You can refresh the data in those fields by clicking on the refresh icon () to the right of that field. An exclamation mark () indicates that the data in the field from which this data is taken is different than the amount presently seen on this page for that field. Click on the refresh icon to obtain the most current data from the source page. You can manually enter data into many of these fields, however if the amount is different than the amount on the source page, an exclamation mark will appear to the right of the field. To pull in the latest amount from the source page, simply click on the refresh icon.

The Settlement Field

The Settlement field in the Add/Edit Negotiation Panel has an additional purpose beyond being used for the Settlement column in the Negotiation table. If a negotiation is saved with a number other than zero in the Settlement field, and there is not already a settlement linked to that negotiation, a new settlement will be added to the Settlement table, with the Date, Plaintiff, Staff, Settlement With, and Settlement columns matching the negotiation's Date, Plaintiff, Staff, Negotiating With, and Settlement columns respectively, and with the Firm Fee column containing \$0.00 because it cannot be blank. This new settlement is considered linked to the negotiation, though there is no additional indication of the link. Any edits to the Settlement field in the negotiation, or to the Gross Settlement Amount field in the settlement, will be reflected in the Settlement column in both the linked negotiation and settlement. Edits to any other field in the negotiation will not be reflected in the linked settlement, nor will edits to any other field in the settlement be reflected in the linked negotiation. A negotiation cannot be deleted if a settlement is linked to it. Deleting a linked settlement will cause the Settlement column in the linked negotiation to become blank; it will then be possible to delete the negotiation.

Settlement Table

The Settlement table is where the details of settlements are stored. Each row of the table represents an individual settlement. See Tables for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Settlement table contains the following available columns:

| Date | Plaintiff | Settled by | Settlement With | Settlement | Amount Received | Type | Firm Fee | Fee Recorded | Amount Dist. | Escrow Acct. | Comments | Action |
|-----------|----------------------|-----------------|--|--------------|-----------------|-------------|-------------|----------------------------|----------------------------------|--------------|----------|--------|
| 7/2/2018 | Gingelhymer, John A. | Vogelberg, Karl | Ins. Company: GEICO Type: Collision \$100,000/\$300,000 Defendant: Simpson, Mary Insured: Simpson, Mary Class #: GE5435354 Adjuster: Simpson, John, Tel. (909) 855-4678 | \$300,000.00 | | Negotiation | \$26,650.66 | | | | | |
| 6/29/2018 | All | Vogelberg, Karl | Ins. Company: GEICO Type: No Fault Primary \$100,000/\$300,000 Defendant: Smith, Mary-Jean Insured: Smith, Mary-Jean Class #: 98745 Adjuster: Singer, A., Tel. (516) 496-5173 | \$300,000.00 | \$300,000.00 | Negotiation | \$99,980.00 | \$99,980.00 (6/29/2018) | \$300,000.00 (multiple dates) | | | |

1. Date: The date the settlement was reached.
2. Plaintiff: The plaintiff whose claim was settled.
3. Settled by: The staff member who reached the settlement.
4. Settlement With: The details of the company being settled with (for insurance companies: the name of the company, insurance type, policy limits, relevant defendant or plaintiff, name of insured, claim number, and adjuster name and phone number; for law firms, the name of the firm and the attorney name and phone number).
5. Settlement: The amount of the settlement. The sum of this column across all rows in the table appears below the last row of the column.
6. Amount Received: The total amount of all checks received in connection with the settlement and the date of the check. If there is only one check, this column lists the date of the check; if there is more than one, it only indicates that there are multiple dates. The sum of the amount in this column across all rows in the table appears below the last row of the column.
7. Type: The type of outcome being recorded as a settlement.
8. Firm Fee: The net fee earned by your firm from the settlement. The sum of this column across all rows in the table appears below the last row of the column.
9. Fee Recorded: The total amount of all money actually taken in and recorded as fees from the settlement and the date the fee intake was recorded. If there is only one recorded intake, this column lists the date of the intake; if there is more than one, it only indicates that there are multiple dates. The sum of the amount in this column across all rows in the table appears below the last row of the column.
10. Amount Distributed: The total amount of all checks issued in connection with the settlement and the date of the check. If there is only one check, this column lists the date of the check; if there is more than one, it only indicates that there are multiple dates. The sum of the amount in this column across all rows in the table appears below the last row of the column.
11. Escrow Account: The firm escrow account into which the settlement was deposited, and from which it was distributed.
12. Comments: Any comments about the settlement
13. Action: A [Right-click icon](#); the right-click menu contains Edit, Email, Delete, and Print.

Editing a Settlement

To edit a settlement:

1. Click the [right-click icon](#) in the Action column of the row representing the settlement you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for settlements, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Settlement Panel](#) for details about the fields.
 4. Click Update to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - If you wish to email the details of the settlement at the same time as you save the changes, click Update & Email instead of clicking Update to save the changes, close the Add/Edit panel, and open the case email panel, using the **[Settlement]** email template, with the details of the settlement automatically included in place of settlement merge codes. Fill out the email with any desired additional content and click Send to send the email, or click the white X at the upper right of the panel instead of clicking Send to close the panel without sending the email. See the [Email/Note Templates](#) administrative page for managing email templates.

Deleting a Settlement

To delete a settlement:

1. Click the [right-click icon](#) in the Action column of the row representing the settlement you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the settlement you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
 3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 4. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the settlement, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Settlement

There are two ways to add a new settlement. One is to link a settlement to an existing negotiation; see [The Settlement Field](#) for details. The other way is as follows:

1. Click the Add Negotiation button. This will bring up an Add/Edit panel for settlements, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Settlement Panel](#) for details about the fields.
 3. Click Save to save the settlement and close the panel.
- If you decide you do not wish to save the settlement, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Emailing a Settlement

To email the details of a settlement:

1. Click the [right-click icon](#) in the untitled column of the row representing the settlement whose details you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Email option in the menu. This will open the Case Email panel, using the **[Settlement]** email template, with the details of the settlement automatically included in place of settlement merge codes.
 3. Fill out the email with any desired additional content. See the [Email/Note Templates](#) administrative page for managing email templates.
 4. Click Send to send the email.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Settlement

To print the details of a settlement:

1. Click the [right-click icon](#) in the untitled column of the row representing the settlement whose details you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the Print icon in the Actions column of the row representing the settlement whose details you wish to print. This will open a new tab containing only the details of the settlement, and immediately bring up your browser's print options for that tab. Skip to step 3.
2. Click the Print option in the menu. This will open a new tab containing only the details of the settlement, and immediately bring up your browser's print options for that tab.
3. Select the print options you desire and print the settlement details. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing only the details of the settlement will remain open. You may close this if you wish.

The Add/Edit Settlement Panel

The Add/Edit Settlement Panel allows you to fill in the details of a settlement. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

| # | Insurance Co./Law Firm | Adjuster/Attorney | Phone | Insurance Type | Plaintiff/Defendant |
|---|------------------------|--------------------|----------------|-------------------|------------------------|
| 1 | GEICO | Kramer, Paula | (800) 861-8380 | Collision | Robinson, Terry-Ann I. |
| | State Farm Insurance | | | Collision | Scrooge, John |
| | State Farm Insurance | Kramer, Paula | (800) 861-8380 | Liability Primary | Scrooge, Ebenezer |
| | GEICO | Lewis, Stacy | | Collision | Robinson, A. Seth |
| | GEICO | Lewis, Stacy | | Liability Primary | Scrooge, Ancelle |
| | MetLife Disability | Aarons, Mark, Esq. | (212) 822-1504 | No Fault Primary | Robinson, A. Seth |

Date: 12/28/2017 (2) Release To Client: 01/02/2018 (7)
Plaintiff*: Robinson, A. Seth (3) Release From Client: 01/16/2018 (8)
Settled by: Dreier, Harry (4) Release To Ins./Att.: 03/19/2018 (9)
Settlement Type: Negotiation (5) Check Expected Date: 04/09/2018 (10)
Escrow Account: (6) Days from Release: 21 (11)
Date Of Distribution: 01/02/2018 (12)

Comments: (13)


Gross Settlement: \$1,000,000.00 (14)
Disbursements: \$2,515.53
Net: \$997,484.47
Gross Attorney Fee: 1/3 from Gross Net
\$332,494.82 Amount
Prior: \$110,831.61
Referrer: \$66,498.97
Other: \$0.00
Firm Fee: \$155,164.24
Liens: \$13,000.00
Medical Bills: \$1,850.00
Interest on Disbursements: \$80.69 5%
Net To Client: \$650,058.96
























Update Update & Email Cancel

1. Settlement with: Radio button list allowing you to choose the company being settled with. The list contains six columns: the radio button, the name of the company, the name of the adjuster or attorney, the primary phone number of the adjuster or the law firm, the insurance type (insurance companies only), and the plaintiff or defendant covered (insurance companies only).
2. Date: The date the settlement was reached.
3. Plaintiff: The plaintiff connected to the settlement.
4. Settled by: The staff member in your firm who settled the case.
5. Settlement Type: Whether the settlement was obtained through Negotiation, Arbitration, or a Judgment.
6. Escrow Account: Into which of your firms escrow account the settlement funds have been deposited.
7. Release To Client: The date the settlement and release agreement was sent to the client for signature.
8. Release From Client: The date the signed settlement and release agreement was received from the client.
9. Release To Ins./Att.: The date the signed settlement and release agreement was sent to the insurance company or law firm with which the case was settled.
10. Check Expected Date: The date the settlement check is expected to be received by your firm. When the date in this field is changed, and the Release To Ins./Att. field is not blank, the Days from Release field is automatically set to the difference in days between the Release To Ins./Att. field and this field.

11. Days from Release: The number of days after sending the signed settlement and release agreement to the company being settled with that a settlement check is expected to be received by your firm. When the number in this field is changed, and the Release To Ins./Att. field is not blank, the Check Expected Date field is automatically set to the date in the Release To Ins./Att. field plus the number of days in this field.
 12. Date Of Distribution: The date your firm sent the amount due to the plaintiff.
 13. Comments: Any comments about the settlement.
14. Settlement Calculation: This is a separate section of the Add/Edit Settlement Panel, used to determine the amount the plaintiff will receive based on a specific settlement amount. The information for most of the fields are taken from information in other pages in the system. You can refresh the data in those fields by clicking on the refresh icon () to the right of that field. An exclamation mark () indicates that the data in the field from which this data is taken is different than the amount presently seen on this page for that field. Click on the refresh icon to obtain the most current data from the source page. You can manually enter data into many of these fields, however if the amount is different than the amount on the source page, an exclamation mark will appear to the right of the field. To pull in the latest amount from the source page, simply click on the refresh icon.

The Checks Sub-Table Fields

The Checks Sub-Table contains information about all checks received by your firm in partial or full settlement of the case, as well as all checks issued by your firm in order to distribute the settlement funds. The Checks Sub-Table can be opened by clicking on the plus sign () to the left of the relevant row of the mail table. The sub-table columns that are available in the Checks sub-table are the following:

| Add Check | | Add All Distribution Checks | | Mass Status Change | | Checks | | | | | | | | | | | Export | |
|---|---|-----------------------------|-----------|---------------------|----------------|---------|---|--------------|---------------------|---------------------|---------------|--------|------------|----------|----------|---|--------|--|
|  |  | Date | Amount | Balance | Status | Check # | Payee | Custom Payee | Debit | Credit | Type | Mailed | Expiration | Received | Comments | Action | | |
|  |  | Distribution | 6/15/2018 | (\$162,024.46) | (\$162,024.46) | Review | Robinson, Terry-Ann L. | | \$162,024.46 | | Plaintiff | | | | |  | | |
|  |  | Distribution | 6/15/2018 | (\$166,666.66) | (\$328,691.12) | Review | SmartAdvocate, LLC | | \$166,666.66 | | Firm Fee | | | | |  | | |
|  |  | Distribution | 6/15/2018 | (\$3,648.84) | (\$332,339.96) | Review | SmartAdvocate, LLC | | \$3,648.84 | | Disbursements | | | | |  | | |
|  |  | Distribution | 6/15/2018 | (\$8,000.00) | (\$340,339.96) | Hold | Independent Medical Examinations, PC | | \$8,000.00 | | Lien | | | | |  | | |
|  |  | Distribution | 6/15/2018 | (\$15,000.00) | (\$355,339.96) | Hold | Home Health Associates of Greater New York, LLC | | \$15,000.00 | | Lien | | | | |  | | |
|  |  | Settlement | | \$100,000.00 | (\$255,339.96) | | | | | \$100,000.00 | Settlement | | | | |  | | |
|  |  | Settlement | | \$400,000.00 | \$144,660.04 | | | | | \$400,000.00 | Settlement | | | | |  | | |
| | | | | \$144,660.04 | | | | | \$355,339.96 | \$500,000.00 | | | | | | | | |

1. [unlabeled column]: Checkbox selection, allowing the selection of one or more rows for Mass Status Change.
2. [unlabeled column]: Whether the check was received as a settlement or paid as a disbursement from the settlement.
3. Date: The date the check was received or issued by your firm.
4. Amount: The amount of the check.
5. Balance: The total balance of the settlement remaining after the check was received or issued by your firm.
6. Status: Whether the check has been cashed or deposited and cleared the issuing bank, printed, is being held, or has been sent to be printed within your firm.
7. Check #: The number of the check.
8. Payee: The name of the contact to whom the check was payable.
9. Custom Payee: This field can be entered manually. It is not currently used in SmartAdvocate, but may be utilized by the QuickBooks integration in a future release.
10. Debit: The amount of a check that was received by your firm.
11. Credit: The amount of a check that was issued by your firm.
12. Type: The aspect of the money due that the check is meant to pay for.
13. Mailed: The date on which the check was placed in the mail by your firm.
14. Expiration: The date on which the settlement expires if not effectuated.
15. Received: The date on which the check was received by your firm.
16. Comments: Any comments about the check.
17. Action: A [Right-click icon](#); the right-click menu contains Edit, and Delete.

Timeline

The Timeline page contains a list of events in the case file relevant to the management and progress of the case. Events may include creation, deletion, modification, and other actions related to appointments, critical comments, documents, medical records, negotiations, notes, settlements, staff members,

case statuses, and tasks. The events listed in the Timeline are added automatically by the SmartAdvocate system and cannot be directly edited or deleted. The Timeline consists of a single table with the following columns:

| Date | Event | Staff | Description | Actions |
|--------------------|------------------------------|-----------------------|--|---------|
| 3/26/2018 12:30 PM | Document (Created) | Simpson, Claude | Plaintiff / Letter - Document Letters - Case Opening - Risperdal | |
| 3/26/2018 10:07 AM | Settlement | Simpson, Claude, Esq. | Plaintiff: Marks, Rodney Law Firm: Castle & Alamos, LLP Advocate: Arcana, Gharik Contact: (555) 555-3674 Settlement: 500000.00 | |
| 3/26/2018 9:12 AM | Negotiations (Modified) | Drieler, Harry | | |
| 3/26/2018 7:22 AM | Critical Deadlines (Deleted) | Drieler, Harry | Criteria: General Type: 120 Day Service Requirement Waived: [] Suspended: [] Respondent: Request From: Action Type: Comments: | |
| 3/26/2018 7:14 AM | Critical Deadlines (Created) | Drieler, Harry | Type: 120 Day Service Requirement | |
| 3/26/2018 12:00 AM | Document (Created) | Drieler, Harry | Email SmartAdvocate, LLC Case# 5015349 - John A. Ginglehymer | |
| 3/27/2018 10:25 AM | Document (Created) | Drieler, Harry | Defendant / Letter - Document (Hospital) Igor Test 1 | |
| 3/27/2018 9:28 AM | Document (Deleted) | Drieler, Harry | Defendant / Letter - Document Igor Test 1 | |

1. Date: The date the event occurred (or will occur, if the event is a future appointment).
2. Event: The type of the event.
3. Staff: The staff member who caused the event.
4. Description: A description of the event.
5. Actions: If the event relates to a document, photograph, or email, the column contains an Open icon; clicking the icon will open the associated document, photograph, or email. Otherwise, the column is empty.

Disbursements

The Disbursements page allows you to view and record the details of case expenses.

The Structure of This Page

1. Disbursement Limit section. Lists the expense budget for the case and allows editing. See [Disbursement Limit](#).
2. Financing: Indicates whether the disbursements have been financed by your firm and, if so, the date from which they were financed. If the case disbursements are marked as financed, the interest will be calculated automatically on the Negotiation/Settlement screen.
3. Summary table. Displays expense totals (total, recoverable, non-recoverable, and waived) spent on behalf of each plaintiff. See [Summary Table](#).
4. Add Disbursement button. Used to add a new disbursement to the case file. See [Adding a Disbursement](#).
5. Disbursement table. Contains the disbursement details and allows various actions to be performed on them. See [Disbursement Table](#).

Disbursement Limit

The disbursement limit is intended to provide a guide as to the budget for expenses on the case. The limit is not a hard cap; a case can continue to accumulate disbursements even after passing the limit, but cases with a total disbursement amount greater than the current limit appear in the Cases With Disbursement Exceeding Limit Report to aid in identifying and tracking them. The Disbursement Limit section contains four elements: the limit amount, any comment on the limit amount, Edit hypertext for editing the limit, and Show History hypertext for viewing past changes to the limit.

If the disbursement limit on a case has not been manually set, it is automatically set by the SmartAdvocate system. If the case has an estimated case value range assigned to it via the Edit Case button on the [Case Summary](#) page, the disbursement limit will automatically be set to the limit associated with that case value range in the [Case Values](#) picklist. If an estimated case value has not been set, the disbursement limit will automatically be set to the value in the Disbursement parameter in the [System Parameters](#) administrative page.

To manually set the disbursement limit, click the Edit hypertext. This will open a panel with two [Text input](#) fields: one for the Disbursement Amount Limit, and one for the Comment. Both must be non-blank. When you have made your desired edits, click Save to save the changes, or Cancel to discard the changes and close the panel.

To return to having the disbursement limit set automatically instead of manually, click the Edit hypertext, then fill in 0 as the disbursement amount limit and save the changes. (The comment must still not be blank, though it will also be automatically reset on saving.)

To view changes in the disbursement limit over the history of the case, click the Show History hypertext. This will bring up a panel listing the limit amount, the date it was set, the date it was replaced, the associated comment, and the staff member who set it.

Summary Table

The Summary table totals the disbursement amounts in the Disbursement table. It is updated automatically when changes are made to the Disbursement table; no changes may be made to the Summary table directly. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Summary table contains the following columns:

| Summary | | | | | |
|------------------------------|-------------------|-------------------|-----------------|---------------|---------------|
| Plaintiffs | Total | Recoverable | Non-Recoverable | Waived | |
| Ginglehymmer, John A. | \$4,563.96 | \$4,563.96 | \$0.00 | \$0.00 | \$0.00 |
| Ginglehymmer, Smeryna | \$952.78 | \$952.78 | \$0.00 | \$0.00 | \$0.00 |
| Marks, Rodney | \$780.10 | \$780.10 | \$0.00 | \$0.00 | \$0.00 |
| | \$6,306.84 | \$6,306.84 | \$0.00 | \$0.00 | \$0.00 |

1. Plaintiffs: The plaintiff whose disbursement totals are listed. Each plaintiff in the case is automatically listed in one row, with the primary plaintiff listed in bold.
2. Total: The total amount of all disbursements made on the plaintiff's behalf.
3. Recoverable: The total value of all recoverable disbursements made on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.
4. Non-Recoverable: The total value of all nonrecoverable disbursements spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.
5. Waived: The total value of all waived disbursements made on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.

Disbursement Table

The Disbursement table is where the details of disbursements are stored. Each row of the table represents an individual disbursement. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Disbursement table contains the following available columns:

| Status | Invoice | Check | Amount | Payee | Type | Plaintiffs | Recoverable | Waived | Comments | Documents | Action |
|---------------|------------------|--------------|----------|----------------------------------|-----------------------|---|-------------|--------|--|---------------------|--------|
| Paid | | 2/11/2018 | \$0.48 | | Postage/Delivery | Ginglehymmer, Smeryna | Yes | No | Was added during medical request envelope generation | | |
| Check Printed | 2/8/2018 #564554 | 2/8/2018 #31 | \$686.25 | Good Samaritan Memorial Hospital | Medical Records | Ginglehymmer, John A. Ginglehymmer, Smeryna Marks, Rodney | Yes | No | 5015349 - Ginglehymmer, John vs- Ripspeed, Mary | | |
| Check Printed | 2/6/2018 #21213 | 2/8/2018 #32 | \$333.33 | GEH Adjusters LTD | Medical Records | Ginglehymmer, John A. Ginglehymmer, Smeryna Marks, Rodney | Yes | No | 5015349 - Ginglehymmer, John vs- Ripspeed, Mary | Complete ER records | |
| Check Printed | 2/6/2018 #12378 | 2/7/2018 #26 | \$25.88 | Smart Litigator | Copies | Ginglehymmer, John A. | Yes | No | 5015349 - Ginglehymmer, John vs- Ripspeed, Mary | | |
| Check Printed | 2/7/2018 #54674 | 2/7/2018 #33 | \$787.87 | Good Samaritan Memorial Hospital | Investigation Expense | Ginglehymmer, John A. Ginglehymmer, Smeryna Marks, Rodney | Yes | No | 5015349 - Ginglehymmer, John vs- Ripspeed, Mary | Complete ER records | |

| Description | Invoice Date | Invoice # | Due Date | Check # | General Ledger # | Payee [From QuickBooks] | Status Date | Share Expenses Across Plaintiffs | Is Payee a Lienor? | Check Mailed Date | Check Date |
|------------------------------|--------------|-----------|-----------|---------|------------------|----------------------------------|-------------|-------------------------------------|--------------------------|-------------------|------------|
| | 2/8/2018 | 564554 | 2/22/2018 | 31 | | Good Samaritan Memorial Hospital | 2/15/2018 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | 2/8/2018 |
| | 2/6/2018 | 21213 | 3/15/2018 | 32 | | GEH Adjusters LTD | 2/16/2018 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | 2/8/2018 |
| 5015349 - Ginglehymmer, John | 2/6/2018 | 12378 | 3/6/2018 | 26 | | Smart Litigator | 2/9/2018 | <input type="checkbox"/> | <input type="checkbox"/> | | 2/7/2018 |
| | 2/7/2018 | 54674 | 3/12/2018 | 33 | | Good Samaritan Memorial Hospital | 3/8/2018 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | 2/7/2018 |

1. Status: The status of the check or other payment.
2. Invoice: The date and number of the invoice associated with the disbursement.
3. Check: The date and number of the check used to pay the disbursement.
4. Amount: The amount of the disbursement. The sum of this column across all rows in the table appears below the last row of the column.
5. Payee: The contact to be paid.
6. Type: The type of expense.
7. Plaintiffs: The plaintiffs on whose behalf the disbursement was made. If none of the plaintiffs in the Plaintiffs field are selected, and the Share Expenses Across Plaintiffs field is selected, this column will contain the names of all plaintiffs in the case.
8. Recoverable: Whether the disbursement can be recovered from the case proceeds.
9. Waived: Whether the recovery of the disbursement was waived.
10. Comments: The description of the expense and any comments about the disbursement.
11. Documents: Any documents related to the disbursement.
12. Action: An [Edit icon](#) and a [Delete icon](#).
13. Description: The description of the expense.
14. Invoice Date: The date of the invoice associated with the disbursement.
15. Invoice #: The number of the invoice associated with the disbursement.
16. Due Date: The date on which payment of the invoice is due.
17. Check #: The number of the check used to pay the disbursement.
18. General Ledger #: The identification number of the disbursement in the general ledger.
19. Payee [From QuickBooks]: Used by the QuickBooks integration; has no purpose otherwise.
20. Status Date: The last date on which the status of the disbursement was changed.
21. Share Expenses Across Plaintiffs: Whether the disbursement should be split equally among the plaintiffs.
22. Is Payee a Lienor?: Whether the payee of the disbursement also holds a lien on the case.
23. Check Mailed Date: The date on which the check used to pay the disbursement was mailed.
24. Check Date: The date of the check used to pay the disbursement.

Editing a Disbursement

To edit a disbursement:

1. Right-click anywhere in the row representing the disbursement you wish to edit. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Action column of the row representing the disbursement you wish to edit. This will bring up an Add/Edit panel for disbursements, with the existing information filled in. Skip to step 3.

2. Click the Edit option in the menu. This will bring up an Add/Edit panel for disbursements, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Disbursement Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Disbursement

To delete a disbursement:

1. Right-click anywhere in the row representing the disbursement you wish to delete. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Action column of the row representing the disbursement you wish to delete. This will *not* bring up a confirmation message; it will simply delete the disbursement.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the disbursement, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Disbursement

To add a new disbursement:

1. Click the Add Disbursement button. This will bring up an Add/Edit panel for disbursements, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Disbursement Panel](#) for details about the fields.
3. Click Save to save the disbursement and close the panel.
 - If you decide you do not wish to save the disbursement, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Disbursement Panel

The Add/Edit Disbursement Panel allows you to fill in the details of a disbursement. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Disbursement' panel with 21 numbered red circles highlighting specific fields and controls:

- 1: Invoice Date (dropdown)
- 2: Invoice # (text input)
- 3: Amount (text input)
- 4: Due Date (dropdown)
- 5: Status (dropdown)
- 6: Status Date (dropdown)
- 7: Check Date (dropdown)
- 8: Check # (text input)
- 9: Check Mailed Date (dropdown)
- 10: General Ledger # (text input)
- 11: Payee (dropdown)
- 12: Is Payee a Lienor? (checkbox)
- 13: Payee [From QuickBooks] (dropdown)
- 14: Disbursement Type (dropdown)
- 15: Description (text input)
- 16: Plaintiffs (checkboxes for Ginglehymic, John A.; Ginglehymic, Sonoma; Marks, Rodney)
- 17: Share Expenses Across Plaintiffs (checkbox)
- 18: Waived (checkbox)
- 19: Recoverable (checkbox)
- 20: Comments (text area)
- 21: Related Documents (table with columns: Description, Category, Sub-Category, Edit, To, From, Origin, Direction, #)

1. Invoice Date: The date of the invoice associated with the disbursement.
2. Invoice #: The number of the invoice associated with the disbursement.
3. Amount: The amount of the disbursement.
4. Due Date: The date on which payment of the invoice is due.
5. Status: The status of the check or other payment.
6. Status Date: The date on which the most recent check status was entered.
7. Check Date: The date of the check used to pay the disbursement.
8. Check #: The number of the check used to pay the disbursement.
9. Check Mailed Date: The number of the check used to pay the disbursement.
10. General Ledger #: The identification number of the disbursement in the general ledger.
11. Payee: The contact to be paid.
12. Is Payee a Lienor?: Whether the payee of the disbursement holds a lien on the case.
13. Payee [From QuickBooks]: Used automatically by the QuickBooks integration; has no purpose otherwise.
14. Disbursement Type: The type of the expense.
15. Description: The description of the expense.
16. Plaintiffs: The plaintiffs on whose behalf the disbursement was made. If neither Share Expenses Across Plaintiffs nor any of the checkboxes in this field is selected, the record will not save.
17. Share Expenses Across Plaintiffs: Whether the disbursement should be split equally among the plaintiffs.
18. Waived: Whether the recovery of the disbursement was waived or not.
19. Recoverable: If neither this field nor any of the checkboxes in the Plaintiffs field is selected, the record will not save.
20. Comments: Any comments about the disbursement.
21. Related Documents: Tool for adding and tracking documents. Click the Select button to add a document to this disbursement.

The Related Documents Field and Documents Panel

The Related Documents field and Documents panel allow you to select documents that have already been added in the case and specifically relate them to a particular record on this page. This can help you quickly identify and access the most relevant document when you or another staff member visits this page at a later time. When you click Select Documents from the right-click menu, or click the Select button in the Related Documents field, a table of the documents in the case will appear. Find the document or documents you wish to associate with the particular record and select the checkbox for each document. Click Select or Update to confirm the selection. The descriptions of each selected document will appear in the Documents column in the table. Clicking the Open icon to the far left of the row will open that document.

Case UDF

The Case UDF page contains all user-defined fields for the case's case type that have Case as their Screen value. It is used to store any information about the case that is not otherwise covered by some page in SmartAdvocate, and that does not fit any other category of user-defined fields. See the [UDF Editor](#) page for creating and managing user-defined fields, for a description of the available field formats, and for an explanation of how user-defined fields are organized on this and other UDF pages.

All Insurance

The All Insurance screen combines both the Plaintiff Insurance and Defendant Insurance screens, allowing you to more quickly add and view insurance information for all parties on the case.

The Structure of This Page

The Insurance Companies table is where the details of insurance policies are stored. Each row of the table represents an individual policy. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

The Insurance Companies table contains the following available columns:

| ADD DEFENDANT INSURANCE COMPANY 1 | | ADD PLAINTIFF INSURANCE COMPANY 2 | | Insurance Companies | | | | | | | | | | Export |
|-----------------------------------|--------------|-----------------------------------|--|---------------------|-------------|--|------------------|----------------------------|-------------|---------|-----------|--|--|--------|
| 3 | Party 4 | Party Type 5 | Insurance Company 6 | Insurance Type 7 | Adjuster 8 | Policy Info 9 | Payments Made 10 | 3rd Party Administrator 11 | Comments 12 | Docs 13 | Action 14 | | | |
| <input type="checkbox"/> | Def, Jessica | Plaintiff | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Liability Primary | Aaron, Mike | Policy Number: 123456 Policy Dates: 2/13/2022 - Unspecified Claim Number: 654321 Limits: \$100,000.00 / \$300,000.00 UM/SUM Limits: \$50,000.00 / \$100,000.00 | | | | | 0 | | | |

1. Add Defendant Insurance Company button: Used to add new Defendant Insurance Company to the case file.
2. Add Plaintiff Insurance Company button: Used to add new Plaintiff Insurance Company to the case file.
3. Checkbox: Used to multi-select two or more insurance companies, which can then be edited or deleted simultaneously.
4. Party: The party covered by the policy.
5. Party Type: Whether the party covered by that policy is a plaintiff or defendant in the case.
6. Insurance Company: The insurance company that wrote the policy and the company's address.
7. Insurance Type: The type of the insurance.
8. Adjuster: The insurance adjuster for the policy and the adjuster's phone number.
9. Policy Info: The details of the policy (the named insured, the policy number, the policy dates, the claim number, the policy limits, and the UM/SUM limits).
10. Payments Made: The total amount of payments made by that insurance.
11. 3rd Party Insurance: The details of the third-party administrator of the policy (the company administering the policy, the administrator's adjuster for the policy, the adjuster's phone number, and the claim number).
12. Comments: Any comments about the policy.
13. Docs: The number of documents associated with the policy and a link to the documents in the [Documents](#) case page.
14. Action: A right-click icon; the right-click menu contains Edit, Copy and Delete. The Copy function cannot be utilized if more than one policy is chosen.

Editing an Insurance Policy

There are two methods to edit an insurance policy:

1. The first is to click the right-click icon in the action column of the row representing the policy you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - a. If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The second method to edit an insurance policy is to check two or more checkboxes to the left of the insurance companies you want to edit. Either click the right-click icon in the untitled column of the row representing the policies you wish to edit, or right-click anywhere in that row. This will bring up a menu of options. Click the Edit option. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in, but only if that information is identical for all of the insurance companies chosen. Fill the any of the fields in with your desired information, which will then be saved in all of the chosen insurance companies.

Deleting an Insurance Policy

There are two methods to delete an insurance policy:

1. The first is to click the right-click icon in the untitled column of the row representing the policy you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - a. If you decide you do not wish to delete the policy, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - b. Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

The second method to delete an insurance policy is to check two or more checkboxes to the left of the insurance companies you want to edit. Either click the right-click icon in the untitled column of the row representing the policies you wish to delete, or right-click anywhere in that row. This will bring up a menu of options. Click the Delete Selected option in the menu. This will bring up a confirmation message (to avoid accidental deletions). Click the OK button in the message to confirm the deletion.

Adding an Insurance Policy

To add a new insurance policy:

1. Click the Add Insurance Company button for the Party the policy belongs to. This will bring up an Add/Edit panel for insurance policies, completely blank.
2. Fill the fields in with your desired information. See [All Insurance](#) for details about the fields.
3. Click Save to save the policy and close the panel.
 - a. If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying an Insurance Policy

You can add a new insurance policy by copying the information of an existing one. This can be useful if a policy applies to multiple plaintiffs in the case, or if a plaintiff has multiple types of policies from the same insurer. To copy an insurance policy:

1. Click the right-click icon in the Action column of the row representing the policy you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for insurance policies, with the information from the policy being copied filled in.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the policy and close the panel.
 - a. If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Adding Plaintiff Insurance

The Add/Edit Insurance Panel allows you to fill in the details of an insurance policy. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Insurance ✕

| Plaintiff:* | 1 Day, Jessica | | | | | | | | | |
|---------------------|--|--|---------|---------------|---|---|---|-------------|---|--------|
| Insurance Company:* | 2 GEICO, PO Box 9506, Fredericksburg, VA 22403 | <input type="checkbox"/> Primary 3 | | | | | | | | |
| Insurance Type:* | 4 Liability Primary | 5 <input type="checkbox"/> Include on the Case Summary | | | | | | | | |
| Adjuster: | 6 Add Adjuster: | | | | | | | | | |
| | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Primary</th> <th style="width: 70%;">Adjuster Name</th> <th style="width: 10%;">↑</th> <th style="width: 10%;">#</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">7</td> <td>Aaron, Mike</td> <td style="text-align: center;">8</td> <td style="text-align: center;">Delete</td> </tr> </tbody> </table> | | Primary | Adjuster Name | ↑ | # | 7 | Aaron, Mike | 8 | Delete |
| Primary | Adjuster Name | ↑ | # | | | | | | | |
| 7 | Aaron, Mike | 8 | Delete | | | | | | | |
| Name of Insured: | 9 | | | | | | | | | |
| Policy Number: | 10 123456 | Claim Number: 11 654321 | | | | | | | | |
| Group Number: | 12 AB-78910 | ID Number: 13 | | | | | | | | |
| Policy Start Date: | 14 02/13/2023 | Policy End Date: 15 08/13/2023 | | | | | | | | |

| | | | |
|---|--|--|----------------|
| Policy Limits: | \$100,000 16 | \$300,000 17 | DED: 18 |
| UM/SUM Policy Limits: | \$50,000 19 | \$100,000 20 | DED: 21 |
| Self Insured Amount: | 22 | <input type="checkbox"/> 100% 23 | |
| | 24 <input type="checkbox"/> Insurance Limit By Multiple Plaintiff | 25 <input type="checkbox"/> Carrier Has Lien? | |
| Comments: | 26 | | |
| | 27 <input type="checkbox"/> Add to Total Coverage | 28 MV Leased: <input type="text"/> | |
| Available Coverage Amount: | 29 | | |
| | 30 <input type="checkbox"/> Authentication to Defense Counsel | <input type="text"/> 31 | |
| Third Party Administrator / Adjusting Company | | | |
| Organization: | 32 | | |
| Adjuster: | 33 | | |
| Claim Number: | 34 | | |

Created at 2/13/2023 10:30:00 AM by Deifel, Marina. **SAVE** **CANCEL**

1. Plaintiff: The plaintiff covered by the policy.
2. Insurance Company: The insurance company providing the coverage.
3. Primary: Checkbox that indicates whether the policy is the plaintiff's primary insurance. No plaintiff can have more than one primary policy; if this field is selected when the policy is saved, it will automatically be deselected in every other policy covering the same plaintiff.
4. Insurance Type: The type of the insurance.
5. Include on the Case Summary: Checkbox to determine whether an insurance company that is not marked as Primary will be shown on the Case Summary page.
6. Adjuster: The insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. Multiple adjusters can be assigned to the case, one of which can be designated as Primary.
7. [Primary Adjuster Radio Button]: A radio button, that when marked, indicates that the selected adjuster is the primary adjuster on the policy.
8. [Adjuster Table]: List of all adjusters assigned to the case. The adjuster designated as Primary will always be displayed first in the list.
9. Name of Insured: The named insured of the policy. If the Select from Plaintiffs and/or Select from Defendants checkbox in the dropdown is selected, the dropdown will only show the plaintiffs and/or the defendants in the case, respectively.
10. Policy Number: The identification number of the policy.
11. Claim Number: The identification number of the claim on the policy related to the case.
12. Group Number: The identification number of the group plan.
13. ID Number: The identification number of the plaintiff in the group plan.
14. Policy Start Date: The start date of the policy.
15. Policy End Date: The end date of the policy.
16. Policy Limits [Individual]: The maximum payment per individual event or injured person.
17. Policy Limits [Aggregate]: The maximum payment per policy period or across all injured people.
18. DED [general]: The deductible that applies to this insurance policy.
19. UM/SUM Policy Limits [Individual]: The maximum payment per injured person in accidents caused by an uninsured or underinsured driver.
20. UM/SUM Policy Limits [Aggregate]: The maximum payment across all injured people in accidents caused by an uninsured or underinsured driver.
21. DED [UM/SUM]: The deductible that applies to the UM/SUM coverage under this insurance policy.
22. Self Insured Amount: The amount that must be paid by the insured before the insurer pays anything.
23. 100%: If checked, the policy is entirely self-insured.
24. Insurance Limit By Multiple Plaintiff: Whether the aggregate policy limits refer to multiple injured individuals or multiple events.
25. Carrier Has Lien?: Whether the insurance company has a lien on the case to recover payments. If this field is selected when a new policy record is created, a lienor record will be created in the Lien Tracking case page with the insurance company listed as the lienor and the insurance type listed as the lienor type. This checkbox does not function when editing an existing insurance record, however (to avoid accidentally creating multiple liens from a single insurance record).
26. Comments: Any comments about the policy.
27. Add to Total Coverage: Whether the coverage available under this policy should be considered part of the total available coverage in the case. If this field is selected, the value of the Current Coverage Amount field is part of the sum listed in the Liability Coverage line in the Case Summary page.
28. MV Leased: Whether the vehicle covered by the policy is leased.

- 29. Available Coverage Amount: The amount of coverage currently available through this policy. Unless the Amount to be Added to Total Coverage field is selected, this field is not editable.
- 30. Authentication to Defense Counsel [Checkbox]: Whether the insurance company has been authorized to release the policy information to defense counsel.
- 31. Authentication to Defense Counsel [Date]: When the insurance company was authorized to release the policy information to defense counsel. Unless the Authentication to Defense Counsel [Checkbox] field is selected, this field is not editable.
- 32. Organization [TPA]: The organization serving as third-party administrator of the insurance policy.
- 33. Adjuster [TPA]: The third-party administrator's insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. When the selection in this field changes, the Phone Number [TPA] field is automatically set to the primary phone number of the selected adjuster.
- 34. Claim Number [TPA]: The third-party administrator's identification number for the claim on the policy related to the case.

Adding Defendant Insurance

The Add/Edit Insurance Panel allows you to fill in the details of an insurance policy. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel is essentially identical to the Add/Edit Plaintiff Insurance panel, with the exception of the UM/SUM fields, which are limited to the Plaintiff Insurance Panel. This panel contains the following fields:

Add Insurance ✕

Defendant:* **1**

Insurance Company:* **2** **3** Primary

Insurance Type:* **4** **5** Include on the Case Summary

Adjuster: **6**

| Primary | Adjuster Name | ↑ | # |
|---|--------------------------|---|--------|
| 7 <input checked="" type="radio"/> | 8 Williams, Wendy | | Delete |
| | | | |

Name of Insured: **9**

Policy Number: **10** Claim Number: **11**

Group Number: **12** ID Number: **13**

Policy Start Date: **14** Policy End Date: **15**

Policy Limits: **16** **17** DED: **18**

Comments: **19**

20 Add to Total Coverage MV Leased: **21**

Available Coverage Amount: **22**

Third Party Administrator / Adjusting Company

Organization: **23**

Adjuster: **24**

Claim Number:

25

SAVE

CANCEL

1. Defendant: The defendant covered by the policy.
2. Insurance Company: The insurance company offering the policy.
3. Primary: Whether the policy is the defendant's primary insurance. No defendant can have more than one primary policy; if this field is selected when the policy is saved, it will automatically be deselected in every other policy covering the same defendant.
4. Insurance Type: The type of the insurance.
5. Include on the Case Summary: Checkbox to determine whether an insurance company that is not marked as Primary will be shown on the Case Summary page.
6. Adjuster: The insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. Multiple adjusters can be assigned to the case, one of which can be designated as Primary.
7. [Primary Adjuster Radio Button]: A radio button, that when marked, indicates that the selected adjuster is the primary adjuster on the policy.
8. [Adjuster Table]: List of all adjusters assigned to the case. The adjuster designated as Primary will always be displayed first in the list.
9. Name of Insured: The named insured of the policy. If the Select from Plaintiffs and/or Select from Defendants checkbox in the dropdown is selected, the dropdown will only show the plaintiffs and/or the defendants in the case, respectively.
10. Policy Number: The identification number of the policy.
11. Claim Number: The identification number of the claim on the policy related to the case.
12. Group Number: The identification number of the group plan.
13. ID Number: The identification number of the defendant in the plan.
14. Policy Start Date: The start date of the policy.
15. Policy End Date: The end date of the policy.
16. Policy Limits [Individual]: The maximum payment per individual event or injured person.
17. Policy Limits [Aggregate]: The maximum payment per policy period or across all injured people.
18. DED: The amount of any deductible on the policy.
19. Comments: Any comments about the policy.
20. Add to Total Coverage: Whether the coverage available under this policy should be considered part of the total available coverage in the case. If this field is selected, the value of the Current Coverage Amount field is part of the sum listed in the Liability Coverage line in the Case Summary page.
21. MV Leased: Whether the vehicle covered by the policy is leased.
22. Available Coverage Amount: The amount of coverage currently available through this policy. Unless the Amount to be Added to Total Coverage field is selected, this field is uneditable.
23. Organization [TPA]: The organization serving as third-party administrator of the insurance policy.
24. Adjuster [TPA]: The third-party administrator's insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. When the selection in this field changes, the Phone Number [TPA] field is automatically set to the primary phone number of the selected adjuster.
25. Claim Number [TPA]: The third-party administrator's identification number for the claim on the policy related to the case.

How to display Total Payments made on the Insurance Page

ToTW Video - All Insurance Page

All Vehicles

This page is under construction. Please check back for updates.

Case Calendar

The Case Calendar page (accessed by clicking the Calendar option in the list of General case pages) contains all the information about appointments, tasks, and critical deadlines associated with the case. The case calendar is virtually identical in appearance and function to the [Office Calendar](#), but the events that appear in the calendar, and the appointments that can be added from this page, are specific to the case itself.

One difference between the Case Calendar and the Office Calendar, is the filter which are set by default on the Case Calendar. By default, when opening the case calendar, the selected date range will be from the Open Date of the case to about ten years after the current date, unless you have set a favorite calendar filter with a different date range as the default.

For more on using the Calendar interface in SmartAdvocate click [here](#).

Caption

The Caption page allows you to view and edit the case caption. This caption is used for document templates; the CA-CAPTION merge code inserts it into generated documents.

Note that the caption created on this page for simple and basic captions. Where multiple courts and/or dockets are involved in a case, a better option may be the Court Caption, which allows different captions to be created for each docket within each court.

Structure of This Page

The screenshot shows a web interface for editing a case caption. At the top, the case title is "MD210411 - Rose, John -v- Moore, Philip" and the event is "Auto Accident (Rear End) 11/29/2021 NY". The user is identified as "Paralegal: Grant, Anthony". The main content area is titled "Application Generated Caption" and contains a legal caption template. The template text is as follows:

SUPREME COURT OF THE STATE OF NEW YORK COUNTY OF QUEENS

----->

JOHN ROSE, MOIRA ROSE, DAVID ROSE AND ALEXIS ROSE, Plaintiff(s), Index No. MD210411

-against-

JOHN DOE, Defendant.

----->

COMPLAINT

The number "1" is written in red above the caption text, and the number "2" is written in red below the caption text.

1. Application Generated Caption checkbox. Used to have SmartAdvocate generate the basic caption.
2. HTML input field. The input field for the caption.
3. Save button. Used to save changes to the caption.

Editing the Caption

To edit the case caption:

1. If you wish to have SmartAdvocate generate a basic caption automatically, click the Application Generated Caption checkbox in the upper-right corner of the page. This will replace the caption with a basic template that contains the names of the plaintiffs in all-caps, listed as "Plaintiff(s)," and the names of the defendants in all caps, listed as "Defendant(s)," with "against" separating the groups.
 - Note: It does not matter whether the checkbox is selected or deselected when clicked. Clicking it will always perform this action.
2. If you wish to edit the text of the caption manually, do so; the caption text forms the contents of an HTML input field. You can manually edit the caption even if the caption text was automatically generated. You can insert merge codes into the caption if desired, however the Caption page has no functionality to automatically choose and insert the merge codes. It will be necessary to manually type the merge codes, or copy and paste them from a template that already contains them.
3. Click the Save button to save the caption changes.
 - Note: If you manually created a caption, clicking on the checkbox will remove the caption you created and replace it with the application generated caption. If you saved the caption you created and have not saved the application created caption, you can recover the caption you created by using the back button on your browser. If you have saved the application generated caption, the caption you created cannot be recovered.

How to Use The SmartAdvocate Caption Feature

Client Portal

The Client Portal case page gives a quick glance at the registration status of the client's assigned to that case, and is where registration for the client can be initiated. Registration can also be done in mass through Case Browse, for more on this feature please click [here](#) to visit the Case Browse help page.

Structure of This Page

* MD230067 - Halpert, Jim vs Scott, Mike

MND - Auto Accident (Head On Collision) 3/15/2023 NY

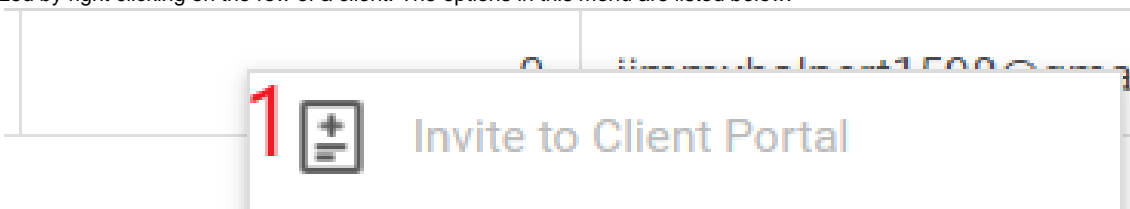
Drag a column header here to group by that column





| | Plaintiff Name | Token Active | Token Expired | Registration Attempts | Registration Email | Token Issued Date | Token Used Date | Bad Login Attempts | User Activated | User Enabled | User Locked | Last IP Address | Last Login Date | UserName |
|--|----------------|--------------|---------------|-----------------------|----------------------------|-------------------|-----------------|--------------------|-------------------------------------|-------------------------------------|-------------|-----------------|-----------------|----------------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| | Halpert, Jim | | | 0 | jimmyhalpert1598@gmail.com | 3/27/2023 | 3/27/2023 | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | 192.168.5.196 | 3/27/2023 | jimmyhalpert1598@gmail.com |

1. Plaintiff Name: The name of the client.
2. Token Active: A check to indicate if the token is active.
3. Token Expired: A check to indicate if the token has expired.
4. Registration Attempts: The number of attempts made by the client to register for the portal.
5. Registration Email: The client's email address, taken from their contact card. The registration invitation will be sent to this address.
6. Token Issued Date: The date this client's registration token was issued.
7. Token Used Date: The date this client's registration token was used to register for the client portal.
8. Bad Login Attempts: The number of unsuccessful attempts the client has made to log into the Client Portal. After a set number of unsuccessful attempts, the client will be locked out of the Portal.
9. User Activated: A check to indicate if the client has activated their token to access the Client Portal.
10. User Enabled: A check to indicate if the client's login to the Client Portal is currently enabled.
11. User Locked: A checkbox to indicate if the client is locked out of the Client Portal.
12. Last IP Address: The IP address from which the client last logged into the Client Portal.
13. Last Login Date: The date on which the client last logged into the Client Portal.
14. User Name: The client's user name for access to the Client Portal (usually the client's email address).

Using This Page

This page is utilized by right clicking on the row of a client. The options in this menu are listed below:



- 2  Send password reset e-mail
- 3  Login as user
- 4  Disable Client Portal Access
- 5  Enable Client Portal Access

1. Invite to Client Portal: This send an invite to the primary email address listed on the client's contact card. In order to register the client must have at least the last 4 digits of their social entered on their contact card.
2. Send Password Reset E-Mail: Send an email to the client allowing them to reset their password.
3. Login as User: Allows you to login and preview the Client Portal as the client.
4. Disable Client Portal Access: Disables access to the client portal for the selected client.
5. Enable Client Portal Access: Allows you to enable access to client portal after it has been disabled.

Client Portal - Client Interface


This page is currently under construction. Check back for updates!

Court Rules

This page is only applicable for firms that have purchased our [Calendar Rules](#) integration. For more information on this integration, contact your sales person.

The CalendarRules integration provides automatic calendar rules for many courts through the United State and can automatically add Critical Deadlines, Appointments, and Tasks to SmartAdvocate based on the court rules of the appropriate jurisdiction. A subscription with CalendarRules is required for this page to work.

Structure of this Page

| MD210411 - Rose, John -v- Moore, Philip | | Auto Accident (Rear End) 11/29/2021 NY | | | Paralegal: Grant, Anthony | |
|---|--------------------------------|--|-----------------------|-----------------------|---|--|
| ADD NEW COURT RULE 1 | | | | | | |
| Court Rule 2 | Jurisdiction 3 | Trigger 4 | Service Type 5 | Trigger Date 6 | Action 7 | |
| | | | | __/__/__ | | |
| Trial | USDC Eastern District New York | Trial | | 8/31/2024 |  | |

1. Add New Court Rule button: Allows you to add deadlines, tasks and appointments.
2. Court Rule: The name of the event type chosen from CalendarRules.
3. Jurisdiction: The court assigned to handling the case.
4. Trigger: The event type chosen.
5. Service Type: The type of service needed.
6. Trigger Date: The date the Trigger event will take place.
7. Action: An action icon allowing you to edit the applied rule, delete the rule from the case (without deleting its associated tasks, deadlines and appointments) or delete the rule and its associated items.

The Edit Court Rule Panel

Court Rule ✕

| | |
|--|---|
| Jurisdiction: 1 <input type="text" value="USDC Eastern District New York"/> | Party: 2 <input type="text" value="Rose, John"/> |
| Trigger: 3 <input type="text" value="Trial"/> | |
| Name: 4 <input type="text" value="Trial"/> | Details: 5 <input type="text"/> |
| Trigger Date: 6 <input type="text" value="08/31/2024"/> | Time: <input type="text" value="09:00 AM"/> 7 |

GET COURT RULES

| | ActivityType | Date | Time | Description |
|---|-------------------|-----------|---------|---|
| > | Task | 8/30/2024 | 7:00 PM | L/D to Notify Court of Settlement to Avoid Assessment of Jury Fees |
| > | Critical Deadline | 8/1/2024 | | Reminder: Prepare and Serve Subpoenas on Trial Witnesses ("Reasonable" Notice Required) |
| > | Critical Deadline | 8/1/2024 | | L/D to Supplement Expert Disclosures and Reports |
| > | Critical Deadline | 8/1/2024 | | L/D to Make Pretrial Disclosures of Witness Lists, Witness Designations, and Exhibits (Based on Trial Date) |
| > | Appointment | 8/31/2024 | 9:00 AM | Day of Trial |
| > | Critical Deadline | 8/16/2024 | | L/D to Serve Offer of Judgment on Adverse Party (Hand/Electronic) |
| > | Task | 5/31/2024 | 7:00 PM | L/D to Make Disclosures Regarding Expert Testimony (Based on Trial Date) |
| > | Critical Deadline | 8/14/2024 | | L/D to Serve Offer of Judgment on Adverse Party (Mail) |

8

Page 1 of 1 (8 items) < **1** >

1. Jurisdiction: A dropdown that allows you to choose from the jurisdictions your firm is subscribed to. This is court from which the rules will be taken.
2. Party: A dropdown list the parties on the case who will be listed as the responsible party for the item.
3. Trigger: The event which will trigger the creation of critical deadlines, appointments, and/or tasks in the case calendar. This list is provided by CalendarRules and cannot be edited from within SmartAdvocate.
4. Name: The name for the court rule. This field will auto populate with the description of the Trigger, however you will be able to edit, replace or remove the information in the field.
5. Details: An additional box to add comments.
6. Trigger Date: The date on which the Trigger will occur.
7. Time: The time at which the Trigger item will occur, if applicable.
8. Rules Table: A table listing all of the items that will be created from generating the Court Rule.

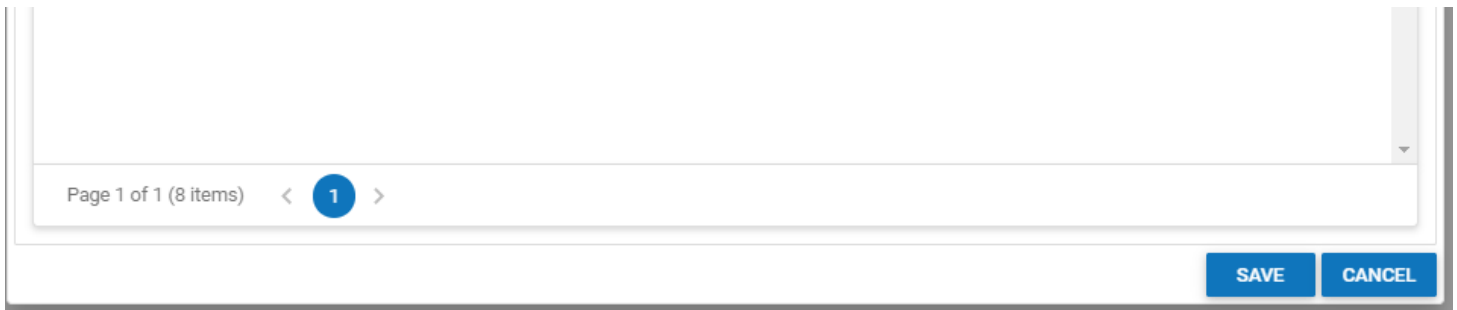
Creating Rules

Court Rule ✕

| | |
|---|--|
| Jurisdiction: <input type="text" value="USDC Eastern District New York"/> | Party: <input type="text" value="Rose, John"/> |
| Trigger: <input type="text" value="Trial"/> | |
| Name: <input type="text" value="Trial"/> | Details: <input type="text"/> |
| Trigger Date: <input type="text" value="08/31/2024"/> | Time: <input type="text" value="09:00 AM"/> |

1

| | ActivityType 2 | Date 3 | Time 4 | Description 5 |
|---|-----------------------|---------------|---------------|---|
| > | Task | 8/30/2024 | 7:00 PM | L/D to Notify Court of Settlement to Avoid Assessment of Jury Fees |
| > | Critical Deadline | 8/1/2024 | | Reminder: Prepare and Serve Subpoenas on Trial Witnesses ("Reasonable" Notice Required) |
| > | Critical Deadline | 8/1/2024 | | L/D to Supplement Expert Disclosures and Reports |
| > | Critical Deadline | 8/1/2024 | | L/D to Make Pretrial Disclosures of Witness Lists, Witness Designations, and Exhibits (Based on Trial Date) |
| > | Appointment | 8/31/2024 | 9:00 AM | Day of Trial |
| > | Critical Deadline | 8/16/2024 | | L/D to Serve Offer of Judgment on Adverse Party (Hand/Electronic) |
| > | Task | 5/31/2024 | 7:00 PM | L/D to Make Disclosures Regarding Expert Testimony (Based on Trial Date) |
| > | Critical Deadline | 8/14/2024 | | L/D to Serve Offer of Judgment on Adverse Party (Mail) |



1. Get Court Rules: Once the other fields from the panel have been filled in press the "Get Court Rules" button to generate the rules.
2. Activity Type: The type of activity the event will be generated in the system as. Clicking on this column will allow you to change the event to a task, deadline, appointment or give you the option to not add it at all.
3. Date: The date the event will be due on. This is editable by clicking on the item inside the column.
4. Time: The time the event is set to take place at. This is editable by clicking on the item inside the column.
5. Description: The description assigned to the event. This is editable by clicking on the item inside the column.

Pressing Save in the bottom right corner will apply the events to your case.

Court Screen

The Court page contains all the information about the courts hearing the case and how the case is filed, tracked, and staffed in the court. Some of the information on this page is presented in a simplified, condensed format in the [Courts/Dockets](#) area of the [Case Summary](#) page, but the Court page contains much more thorough information, and is the only place where the information can be directly edited. The page is divided a table for courts, then further divided into subtables for each docket and judge/clerk in the selected court.

Note: "Docket" in the SmartAdvocate system is a somewhat general term. It is used to signify any means by which the case is identified by the court. This may literally be a docket number, but it may also be an index number or some other identifier. Some courts may assign several different types of "dockets" for a single case. See the [IndexType](#) picklist for defining the available identifiers that can be used as dockets.

The Structure of This Page

Note: The Add Docket Button, Docket Table, Add Judge/Clerk button, and Judge/Clerk table are all associated with an individual row of the Court table, and only appear if the row is set to display sub tables. For that reason, whether these tables appear in your Court page, and where in the Court table they appear, will depend on which row, if any, of the Court table is set to display sub tables. See [Sub tables and the Open/Closed Column](#).

TC220216- Huxtable, Claire -v- Bunker, Archibald Auto Accident (Intersection, Rear End, Red Light) 8/6/2021 GA Attorney: Dreier, Harry Paralegal: Clark, Trei

ADD COURT **Court**

| Court | Address | Phone | Department | Active | Comment | Action |
|--------------------------------|--|----------------|------------|--------|---------|--------|
| Polk county Superior Court (A) | 100 Prior St # 106 Cedartown, Polk, GA 30125 | (770) 749-2114 | | Yes | | |

ADD DOCKET **Docket**

| Docket/Court# | Type of Court/Docket# | Active | Filing Date | Payee | Price | Check# | Check Date | E-File | Comment | Document | Action |
|------------------|-----------------------|--------|-------------|-------|-------|--------|------------|--------|---------|----------|--------|
| 2022 CV 12345678 | Civil Action | Yes | | | | | | No | | | |

Page 1 of 1 (1 items) **LAYOUT**

ADD JUDGE/CLERK **Judge and Magistrate Information**

| Docket/Court# | Judge/Clerk | Role | Address | Phone | Action |
|------------------|----------------|-------|---------|-------|--------|
| 2022 CV 12345678 | Lopez, Juanita | Judge | | | |

Page 1 of 1 (1 items) **LAYOUT**

1. Court Table
2. Docket Table
3. Judge/Clerk Table

Court Table

At the top of the screen in the Court page is the court table containing courts that have heard or are hearing the case. Each court will have its own row in the table. Expanding the row to display sub tables will reveal dockets and judge/clerk tables for each court. Expand the row by clicking on the arrow next to the name of the court.

The Court Table has the following columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|--------------------------------|--|----------------|------------|---------|--------|---|
| Court | Address | Phone | Department | Comment | Action | |
| Polk county Superior Court (A) | 100 Prior St # 106 Cedartown, Polk, GA 30125 | (770) 749-2114 | | | | |

1. Add Court Button: Allows you to assign a new court to the case.
2. Court: Lists the name of the Court contact linked through the [Add/Edit Case Court Panel](#).
3. Address: Lists the primary address of the Court contact linked through the [Add/Edit Case Court Panel](#).
4. Phone Number of the Court: Lists the primary address of the Court contact linked through the [Add/Edit Case Court Panel](#).
5. Department: A text field allowing the department of the court that the case is being handled by.
6. Comment: A text field allowing entry of any comments on this court with respect to this case.
7. Action Column: Contains an action icon with a dropdown that allows you to Edit or Delete the Court from the case, or assign a new docket or Judge/Clerk to the court.

Adding a Court

Clicking the Add Court button brings up the add/edit form for courts, which has the following fields:

1. Name: A [Contact-list dropdown](#) that only includes contacts whose contact type is Court. Select the court you wish to add to the case.
2. Department: Text field; enter the department of the court.
3. Plaintiff Caption: Text field; the plaintiff portion of the caption.
4. Defendant Caption: Text field; the defendant portion of the caption.
5. Comments: A text input field. Any comments on this court with respect to this case.
6. Active: A checkbox. Whether the court is currently hearing the case. If this is not selected, none of the dockets in this court, nor the court itself, will be visible in the Courts / Dockets area of the Case Summary page, although they will remain accessible on the Court Page.

Docket Table

When the rows in the court table are expanded, the docket table is displayed.

The Docket Table has the following columns:

| Docket | | | | | | | | | | | |
|------------------|-----------------------|-------------|-------|-------|--------|------------|--------|---------|----------|--------|--|
| Docket/Court# | Type of Court/Docket# | Filing Date | Payee | Price | Check# | Check Date | E-File | Comment | Document | Action | |
| 2022 CV 12345678 | Civil Action | | | | | | No | | | | |

1. Add Docket Button: Allowed you to add a Docket/Court # to the case.
2. Docket/Court#: A text input field. The identification number used by the court for the docket.
3. Type of Court/Docket#: A dropdown allowing you to select what type of identification number is represented by the entry in Docket #. This is configurable from the [Court Index Types](#) item in [Picklist Maintenance](#).
4. Filing Date: A date-widget dropdown. The date the docket was filed with the court.
5. Payee: A contact-list dropdown. The contact to whom the filing fee was paid.
6. Price: A text input field. The amount of the filing fee.
7. Check #: A text input field. The number of the check used to pay the filing fee.
8. Check Date: A date-widget dropdown. The date on the check used to pay the filing fee.
9. E-File: A checkbox. Whether e-filing is available for this docket. If this is selected, the docket will have an e-filing icon at the beginning of the docket column for that docket in the Courts/Dockets area of the Case Summary page.
10. Comment
11. Document
12. Actions: An action column containing an edit icon and a delete icon.

Adding a Docket


Clicking the Add Docket button brings up the add/edit form for dockets, which has the following fields:

1. Docket/Court#: A text input field. The identification number used by the court for the docket.
2. Active: A checkbox. Whether the docket is currently active. If this is not selected, this docket will not be visible in the Courts / Dockets area of the Case Summary page, although it will remain accessible on the Court Page.
3. E-File: A checkbox. Whether e-filing is available for this docket. If this is selected, the docket will have an e-filing icon at the beginning of the docket column for that docket in the Courts/Dockets area of the Case Summary page.
4. Type of Court/Docket#: A dropdown. What type of identification number is represented by the entry in Docket # (see the note at the top of this page).
5. Filing Date: A date-widget dropdown. The date the docket was filed with the court.
6. Payee: A contact-list dropdown. The contact to whom the filing fee was paid.
7. Price: A text input field. The amount of the filing fee.
8. Check #: A text input field. The number of the check used to pay the filing fee.
9. Check Date: A date-widget dropdown. The date on the check used to pay the filing fee.
10. Caption Document: Dropdown; the document attached to the case that should be used as the caption document.
11. Comments: A text input field. Any comments regarding this docket.

Judge/Clerk Table

When the rows in the court table are expanded, the judge/clerk table is displayed.

The Judge/Clerk Table has the following columns:

| ADD JUDGE/CLERK 1 | | | | | | | Judge and Magistrate Information | |
|-------------------|----------------|--|-------|---------|--|-------|---|--|
| 2 | 3 | | 4 | 5 | | 6 | 7 | |
| Docket/Court# | Judge/Clerk | | Role | Address | | Phone | Action | |
| 2022 CV 12345678 | Lopez, Juanita | | Judge | | | |  | |

1. Add Judge/Clerk button: Allows you to create a new entry in the table.
2. Docket/Court #: The Docket/Court # associated with that judge.
3. Judge/Clerk: A contact-card link for the individual.
4. Role: The individual's role in the case.
5. Address: The primary address of the individual.
6. Phone: The primary phone number of the individual.
7. Actions: An action column containing an edit icon and a delete icon.

Adding a Judge/Clerk

Clicking the Add Judge/Clerk button brings up the add/edit form for judges/clerks, which has the following fields:

Add/Edit Judge or Clerk

Docket/Court#: 1 2022 CV 12345678

Judge/Clerk: 2

Role: 3

SAVE CANCEL

1. Docket/Court #: A dropdown containing any docket/court numbers associated with that court.
2. Judge/Clerk: A contact-list dropdown that only includes individuals with judicial contact types (such as Judge or Magistrate).
3. Role: A dropdown allowing the selection of that individual's role in the case.

Critical Comments

The Critical Comments page allows you to manage a case's critical comments. These are brief messages that should be seen by anyone visiting the case file, generally warnings about some aspect of the case or other urgent alerts. They pop up whenever a user opens the case and will not permit the user to enter the case without first clicking on the "Acknowledge" button.

The Structure of This Page

| ADD COMMENT 1 | | | | | | | Critical Comments | | Export |
|--------------------------|-------------------|-------------------------------------|------------------------|--|---------------|---|-------------------|--|--------|
| <input type="checkbox"/> | Date/Time | Active | Do Not Show After Date | Comment | Staff | Action | | | |
| <input type="checkbox"/> | 3/27/2023 7:18 PM | <input checked="" type="checkbox"/> | | 2 The client is very sick and in the hospital. Okay to talk to her mom, Helen. | Debra, Marina |  | | | |

1. Add Comment button. Used to add critical comments to the case file. See [Adding a Critical Comment](#).
2. Critical Comments table. Contains the critical comments and allows various actions to be performed on them. See [Critical Comments Table](#).

Critical Comments Table

The Critical Comments table is the main part of the Critical Comments page. Each row of the table represents an individual critical comment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Critical Comments table contains the following columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|--------------------------|-----------|--------|------------------------|---------|-------|--------|
| <input type="checkbox"/> | Date/Time | Active | Do Not Show After Date | Comment | Staff | Action |

| DATE/TIME | ACTIVE | DO NOT SHOW AFTER DATE | COMMENT | STAFF | ACTIONS |
|-------------------|-------------------------------------|------------------------|--|--------------|---------|
| 3/27/2023 7:18 PM | <input checked="" type="checkbox"/> | | The client is very sick and in the hospital. Okay to talk to her mom, Helen. | Debra, Marie | |

1. Critical Comment selection: Use to select one or more critical comments.
2. Date/Time: The date and time the critical comment was created. This information is automatically added at the creation of the critical comment and cannot be changed.
3. Active: Whether the critical comment appears when a user opens the case file.
4. Do Not Show After Date: The date after which the critical comment will no longer be shown (i.e., will no longer be Active), if one is entered.
5. Comment: The text of the critical comment itself.
6. Staff: The staff member who created the critical comment. This information is automatically added at the creation of the critical comment and cannot be changed.
7. Actions: An action icon, allowing you to Edit, Delete or Deactivate the Critical Comment.

Editing a Critical Comment

To edit a critical comment:

1. Click the Actions icon, then click on [Edit](#), in the Action column of the row representing the critical comment you wish to edit. This will bring up an Add/Edit panel for critical comments, with the existing information filled in.
- Fill the fields in with your desired information. See [The Add/Edit Critical Comment Panel](#) for details about the fields.
1. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Critical Comment

To delete a critical comment:

1. Click the Actions icon, then click on [Delete](#), in the Action column of the row representing the critical comment you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
 2. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the critical comment, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Critical Comment

To add a new critical comment:

1. Click the Add Comment button. This will bring up an Add/Edit panel for critical comments, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Critical Comment Panel](#) for details about the fields.
3. Click Save to save the critical comment and close the panel.
 - If you decide you do not wish to save the critical comment, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deactivating or Reactivating a Critical Comment

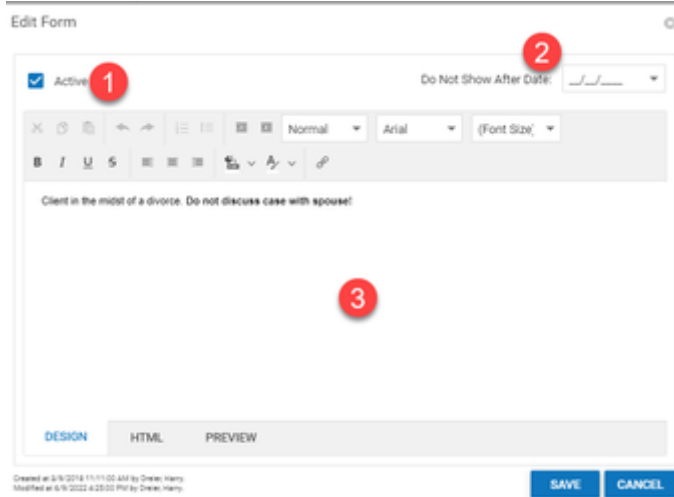
You can deactivate a critical comment without deleting it. This will prevent it from appearing in the Critical Comments Panel when a user opens the case page, but still allow you to reactivate it later if it becomes important again, without having to create it anew. There are several methods to deactivate or reactivate a critical comment:

1. On the Critical Comments page, click the Actions icon, then click on [Edit](#), in the Actions column of the row representing the critical comment you wish to edit. This will bring up an Add/Edit panel for critical comments.
 - To deactivate the critical comment, deselect the Active field. To reactivate the critical comment, select the Active field.
 - Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
2. To deactivate multiple critical comments from the Critical Comment page, use the selection check boxes to choose the comments you want to deactivate. Right click anywhere in the row of one of the selected comments and click on Deactivate.
3. To deactivate a critical comment while it is open on the Case Summary screen, click the Deactivate button.
4. You can also turn off critical comments in a case *for the rest of that day* while a comment is open by clicking on the "Snooze Critical Comments on this case for today" checkbox.



The Add/Edit Critical Comment Panel

The Add/Edit Critical Comments Panel allows you to fill in the details of an investigation. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Active: A checkbox that determines whether the critical comment is active.
2. Do Not Show After Date: A date box allowing you to set the date after which the critical comment should no longer appear.
3. Comment: The text of the critical comment.

Critical Deadlines Screen

Click [here](#) to go directly to our section on Statute of Limitations:

Click [here](#) to go directly to our section on Plaintiff Statute of Limitations:

Click [here](#) to go directly to our section on Critical Deadlines.

The Critical Deadlines page contains all the information about deadlines that must be met to ensure the continuation of the case, including statutes of limitation. Some of the information on this page is also presented in a simplified, condensed format in the [Pending Critical Deadlines](#) area of the [Case Summary](#) page, and it also can be viewed in the [Case Calendar](#) or [Office Calendar](#), but the Critical Deadlines page contains much more detailed information, and is the only place where the information can be directly edited.

Most of the statutes of limitation that appear on this page are not added manually from the page, but are instead automatically generated when the case is created. However, it is likely that SOLs will be manually edited from this page to record deadlines subsequent to the initial statute of limitations. See the [Case Types](#) administrative page for determining the statutes of limitation that are automatically applied to new cases.

The Structure of This Page

Note: The Add Tolling/Extension button and Tolling/Extension table are both associated with an individual row of the Statutes of Limitation table, and only appear if the row is set to display sub tables. For that reason, whether these tables appear in your Critical Deadlines page, and where in the Statutes of Limitation table they appear, will depend on which row, if any, of the Statutes of Limitation table is set to display sub tables. See [Sub tables and the Open/Closed Column](#).

| Statutes Of Limitation Export | | | | | | | | | | | | | | | | | | | | | |
|--|----------------|---|-----------------------|---|---|----------|--|-------------------------------------|--------------|------------------|-------------|--------------|-----------------|----------|--------------------|--|--|--|--|--|--|
| <input type="checkbox"/> | Defendant Name | SOL | Summons and Complaint | Service | Answer | Comments | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Scott, Mike | Date: 3/16/2026 Type: SOL(3 0 0) Complied: 3/1/2023 | Filing Date: 3/1/2023 | Last Date To Serve: 6/29/2023 Date Of Service: 3/15/2023 | Due Date: 4/7/2023 Received Date: 4/7/2023 | | | | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between; align-items: center;"> ADD TOLLING/EXTENSION Tolling/Extension for Scott, Mike SOL(3 0 0) </div> <table border="1" style="width: 100%;"> <thead> <tr> <th>Cause</th> <th>Date</th> <th>Date Effective</th> <th>Ending Date</th> <th>New SOL Date</th> <th>Tolling Removed</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td colspan="7" style="text-align: center;">No data to display</td> </tr> </tbody> </table> | | | | | | | | Cause | Date | Date Effective | Ending Date | New SOL Date | Tolling Removed | Comments | No data to display | | | | | | |
| Cause | Date | Date Effective | Ending Date | New SOL Date | Tolling Removed | Comments | | | | | | | | | | | | | | | |
| No data to display | | | | | | | | | | | | | | | | | | | | | |
| Page 1 of 1 (1 items) LAYOUT | | | | | | | | | | | | | | | | | | | | | |
| Plaintiff Statutes Of Limitation Export | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Plaintiff Name | SOL Type | SOL Date | Date Complied | Comments | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Halpert, Jim | No Fault(0 0 30) | 4/15/2023 | | | | | | | | | | | | | | | | | | |
| <div style="display: flex; justify-content: space-between; align-items: center;"> ADD TOLLING/EXTENSION Tolling/Extension for Halpert, Jim No Fault(0 0 30) </div> <table border="1" style="width: 100%;"> <thead> <tr> <th>Cause</th> <th>Date</th> <th>Date Effective</th> <th>Ending Date</th> <th>New SOL Date</th> <th>Tolling Removed</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td colspan="7" style="text-align: center;">No data to display</td> </tr> </tbody> </table> | | | | | | | | Cause | Date | Date Effective | Ending Date | New SOL Date | Tolling Removed | Comments | No data to display | | | | | | |
| Cause | Date | Date Effective | Ending Date | New SOL Date | Tolling Removed | Comments | | | | | | | | | | | | | | | |
| No data to display | | | | | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%;"> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Beasley, Pam</td> <td>No Fault(0 0 30)</td> <td>4/15/2023</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | | | | | | | <input checked="" type="checkbox"/> | Beasley, Pam | No Fault(0 0 30) | 4/15/2023 | | | | | | | | | | |
| <input checked="" type="checkbox"/> | Beasley, Pam | No Fault(0 0 30) | 4/15/2023 | | | | | | | | | | | | | | | | | | |
| Page 1 of 1 (2 items) Critical Deadlines | | | | | | | | | | | | | | | | | | | | | |

| Critical Deadlines | | | | | | | | | | Export |
|--------------------------|-----------|-------------------------|-------------------|--------------|-------------|--------|------------|----------|---------|--------|
| Criteria | Type | Party | Responsible Party | Due Date | Date Compli | Waived | Superseded | Comments | Actions | |
| <input type="checkbox"/> | Discovery | Production of Documents | Scott, Mike | Beasley, Pam | 7/27/2023 | | No | No | | |

1. Add SOL button. Used to add a new defendant-centric statute of limitations to the case file. See [Adding an SOL](#).
2. Statutes of Limitation table. Contains the details of statutes of limitations and allows various actions to be performed on them, including edit, delete, add tolling/extension, and view the history. See [Statutes of Limitation Table](#).
3. Add Tolling/Extension button. Used to add a new tolling or extension of a statute of limitations to the case file. See [Adding a Tolling or Extension](#).
4. Tolling/Extension table. Contains the details of tollings or extensions of a particular statute of limitations and allows various actions to be performed on them. This is also available for plaintiff-centric deadlines as seen below items 5 and 6. See [Tolling/Extension Table](#).
5. Add Plaintiff SOL button. Used to add a new plaintiff-centric statute of limitations to the case file. See [Adding a Plaintiff SOL](#).
6. Plaintiff Statutes of Limitation table. Contains the details of plaintiff-centric statutes of limitations and allows various actions to be performed on them. See [Plaintiff Statutes of Limitation Table](#).
7. Add Critical Deadline button. Used to add a new critical deadline to the case file. See [Adding a Critical Deadline](#).
8. Critical Deadlines table. Contains the details of critical deadlines and allows various actions to be performed on them. See [Critical Deadlines Table](#).

Statutes of Limitation Table

The Statutes of Limitation table is where the details of defendant-centric statutes of limitations are stored. "Defendant-centric," in this context, means that the action governed by the statute of limitations applies to an individual defendant. Most notably, the statute of limitations for filing a summons and complaint should be listed in this table, because the summons and complaint is directed at a particular defendant. See the [SOL Types](#) picklist for defining available SOL types, and see the [Case Types](#) administrative page for determining the statutes of limitation that can be added to cases based on the case type, state, and role of the party to which the SOL is connected. Each row of the table represents an individual statute of limitations. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Statutes of Limitation table contains the following columns available by default:

| Statutes Of Limitation | | | | | | | | Export |
|--------------------------|----------------|---|-----------------------|---|---|----------|--|--------|
| ADD SOL | Defendant Name | SOL | Summons and Complaint | Service | Answer | Comments | | |
| <input type="checkbox"/> | Scott, Mike | Date: 3/16/2026 Type: SOL(3 0 0) Complied: 3/1/2023 | Filing Date: 3/1/2023 | Last Date To Serve: 6/29/2023 Date Of Service: 3/15/2023 | Due Date: 4/7/2023 Received Date: 4/7/2023 | | | |
| <input type="checkbox"/> | Scott, Maria | Date: 3/16/2026 Type: SOL(3 0 0) | | | | | | |

Page 1 of 1 (2 items) < 1 >

LAYOUT

1. [column with no title]: An arrow sign in this column indicates that additional information is available for the row in which the arrow sign is located (in this instance, tolling and extension information for the statutes of limitations applicable to that defendant). Clicking on the plus sign opens the Tolling/Extension sub table for that defendant.
2. Defendant Name: The defendant to whom the action governed by the SOL applies.
3. SOL: The details of the SOL (the deadline date, the SOL type and length, and the date of compliance).
4. Summons and Complaint: The details of the summons and complaint (whether it was amended, the filing deadline for a summons and complaint, and the date the summons and complaint were filed).
5. Service: The details of serving the summons and complaint (the deadline to serve the summons and complaint, the date the summons and complaint were delivered to a process server, and the date the summons and complaint were served).
6. Answer: The details of the answer (the deadline for the defendant to serve an answer, and the date the answer was received).
7. Comments: Any comments about the statute of limitations and subsequent deadlines.
8. [column with no title]: Contain an action icon; right-click menu contains Edit, Add Tolling/Extension, Delete, and View History if none of the row checkboxes are selected; otherwise, right-click menu contains Update Selected, Add Tolling/Extension [inactive], Delete Selected, and View History [inactive].

Additional columns are available for the Statutes of Limitation table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are:

1. Affidavit Filed: The date the affidavit of service was filed.
2. Affidavit Filing Deadline: The deadline to file the affidavit of service.
3. Amended: Whether the summons and complaint were amended.
4. Answer Due: The deadline for the defendant to serve an answer.
5. Answer Received: The date the answer was received.
6. BP/Interrogatories Due: The deadline to serve a bill of particulars or an answer to interrogatories.
7. BP/Interrogatories Exchanged: The date the bill of particulars or answer to interrogatories was exchanged.
8. BP/Interrogatories Response Received: The date the bill of particulars or answer to interrogatories were received from the defendant.
9. BP/Interrogatories Served/Received: The date the bill of particulars or answer to interrogatories were served or received on the defendant.
10. Date Complied: The date of compliance with the SOL.
11. Documents: Any documents that are attached to the SOL through the [Add/Edit SOL panel](#)
12. Filing affidavit Required: A checkbox indicating whether filing an affidavit of service is required.
13. From Date Process Server: The date the affidavit of service was received from the process server.
14. Last Date File S&C: The filing deadline for a summons and complaint.
15. Last Date To Mail: The deadline to mail the summons and complaint to the defendant.
16. Last Date to Serve: The deadline to serve the summons and complaint.
17. Mailed To Defendant: The date the summons and complaint were mailed to the defendant.
18. Mailing Required: A checkbox indicating whether mailing the summons and complaint to the defendant is required.
19. Process Server Date: The date the summons and complaint were delivered to a process server.

20. S&C Filing Date: The date the summons and complaint were filed.
21. Service Date: The date the summons and complaint were served.
22. SOL Date: The deadline of the SOL.
23. SOL Type: The SOL type (including its length).

Editing a Statute of Limitation

You can edit a single statute of limitations, or multiple statutes simultaneously. To edit a single \ SOL:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for \ statutes of limitations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit SOL Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
5. If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

To edit multiple SOLs:

1. In the column with a checkbox heading, select the checkboxes in the rows representing the SOLs you wish to edit.
2. Click the [action icon](#) in the untitled column of any row, or right-click anywhere in the table. This will bring up a menu of options.
3. Click the Update Selected option in the menu. This will bring up a condensed [Add/Edit panel](#) for statutes of limitations, completely blank.
4. Fill the fields in as desired. Any fields that are filled in will apply to each of the selected SOLs. Any fields that are left blank will be unchanged in each of the selected SOLs, except the Amended, Mailing Required, and Filing Affidavit Required fields, which if left blank will deselect their respective fields in each of the selected SOLs. See [The Add/Edit SOL Panel](#) for details about the fields.
5. Click Save to save the changes and close the panel.
6. If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a SOL

You can delete a single statute of limitations, or multiple ones simultaneously. To delete a single SOL:

1. Click the [action icon](#) in the untitled column of the row representing the SOL you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
4. If you decide you do not wish to delete the SOL, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
5. Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

To delete multiple SOLs:

- In the column with a checkbox heading, select the checkboxes in the rows representing the SOLs you wish to delete.
- Click the [right-click icon](#) in the untitled column of any row, or right-click anywhere in the table. This will bring up a menu of options.
- Click the Delete Selected option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the SOL, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an SOL

To add a new statute of limitations:

- Click the Add SOL button. This will bring up an Add/Edit panel for statutes of limitations, blank except for defaults.
- Fill the fields in with your desired information. See [The Add/Edit SOL Panel](#) for details about the fields.
- Click Save to save the SOL and close the panel.
- If you decide you do not wish to save the SOL, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Viewing the History of a SOL

You can view the history of a statute of limitations. This can be useful if you edit the SOL over time to keep it up to date regarding compliance with the SOL and ensuing deadlines. To do so, click the [right-click icon](#) in the untitled column of the row representing the SOL whose history you wish to view, or right-click anywhere in that row. This will bring up a menu of options. Click the View History option in the menu. This will bring up the SOL History panel. This panel displays the SOL History table, where past versions of the SOL are stored. The table has columns for the staff member who made the modification, the date the modification was made, and the SOL, Summons and Complaint, Service, Answer, and Comments columns at the time of the modification. Click the white X at the upper right of the SOL History panel or click anywhere on the Critical Deadlines page other than the panel to close the panel.

Clicking any row of the SOL History table brings up additional details about the SOL at the time of the modification. In addition to the name of the staff member who made the modification and the date the modification was made, the entries in most of the fields in the [Add/Edit SOL panel](#) at the time of the modification are listed. Click the Exit button in the lower right of the listing of details to close it (this will not close the SOL History panel).

The Add/Edit SOL Panel

The Add/Edit SOL Panel allows you to fill in the details of a statute of limitations. The panel is slightly different when editing multiple SOLs than when editing a single SOL or adding an SOL; some fields do not appear when editing multiple SOLs. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit SOL



Defendant: * 1 Scott, Mike

SOL Type: * 2 SOL(3 0 0)

Amended: 3

From Date: 4 03/16/2023 Pick From Date 5

SOL Date: 6 03/16/2026

Date Complied: 7 03/01/2023

To Process Server: 8 9

Last Date to File S&C: 10 Critical Deadline? 11

Date of Filing S&C: 12 03/01/2023

Last Date to Serve S&C: 13 03/29/2023 Critical Deadline? 14

Date of Service: 15 03/15/2023

Served By: 16

Method of Service: 17

Mailing Deadline: 18 Mailing Required 19

Mailed To Defendant: 20

Affidavit Filing Deadline: 21 Filing Affidavit Required 22

Affidavit Filed: 23

From Process Server: 24

Answer Due: 25 04/07/2023 Critical Deadline? 26

Answer Received: 27 04/07/2023

Calculate Answer Due Date 28

[Extend Time](#) [Show History](#)

BP/Interrogatories

Due: 29 Critical Deadline? 30

Served/Received: 31

Exchanged: 32 Response Received: 33

34 35

Comments:

36

Related Documents:

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |
| 39 | | | | | | | | |

Created at 3/27/2023 3:21:00 PM by Delfel, Marina.
Modified at 4/3/2023 12:15:00 PM by Delfel, Marina.

1. Defendant: The defendant to whom the action governed by the SOL applies.
2. SOL Type: The SOL type (including its length).
3. Amended: Checkbox indicating whether the summons and complaint were amended.
4. From Date [any date]: The date from which the SOL begins to be counted. This will not appear when editing multiple SOLs. When the selection in this field is changed manually or automatically set, and the SOL Type is neither blank nor the neutral option, the SOL Date field is automatically set to the date in this field plus the length of the SOL selected in SOL Type field.
5. From Date [relevant dates]: The date from which the SOL begins to be counted. This field cannot be left blank. This will not appear when editing multiple SOLs. When the selection in this field changes, the From Date field is automatically set to the date in the selected option (if it changes to Pick From Date, the From Date field does not change, but the SOL Date is automatically set as if it had).
6. SOL Date: The deadline date of the SOL.
7. Date Complied: The date of compliance with the SOL.
8. To Process Server: The date the summons and complaint were delivered to a process server.
9. Arrow button: Clicking this button automatically moves either the Date of Filing S&C (item 12) or the Date of Service (item 15) to the Date Complied field.
10. Last Date to File S&C: The filing deadline for a summons and complaint.
11. Critical Deadline? [Filing S&C]: Checkbox indicating whether the deadline to file the summons and complaint should be added as a critical deadline for the case.
12. Date of Filing S&C: The date the summons and complaint were filed. If the Date Complied field is not blank, clicking the Same As Date Complied button next to this field will replace the date in this field with the date in the Date Complied field. When the date in this field is changed manually or set using the Same As Date Complied button, the Last Date to Serve S&C field is, by default, automatically set to 120 days after the date in this field. The number of days can be changed under Admin > System Parameters > Critical Deadline Group.

13. Last Date to Serve S&C: The deadline to serve the summons and complaint. When the date in this field is changed manually or automatically set, the Critical Deadline? [S&C] field is automatically selected. When the date in this field is deleted, the Critical Deadline? [S&C] field is automatically deselected.
14. Critical Deadline? [Serving S&C]: Checkbox indicating whether the deadline to serve the summons and complaint should be considered a critical deadline for the case.
15. Date of Service: The date the summons and complaint were served.
16. Served by: Dropdown allowing you to choose who served the summons and complaint from all contacts in SmartAdvocate.
17. Method of Service: Dropdown allowing you to select the means by which service was effected.
18. Mailing Deadline: The deadline to mail the summons and complaint to the defendant.
19. Mailing Required: Whether mailing the summons and complaint to the defendant is required.
20. Mailed To Defendant: The date the summons and complaint were mailed to the defendant.
21. Affidavit filing Deadline: The deadline to file the affidavit of service.
22. Filing Affidavit Req'd: Checkbox indicating whether filing an affidavit of service is required.
23. Affidavit Filed: The date the affidavit of service was filed.
24. From Process Server: The date the affidavit of service was received from the process server.
25. Answer Due: The deadline for the defendant to serve an answer.
26. Critical Deadline? [Answer]: Checkbox indicating whether the deadline for the defendant to serve an answer should be considered a critical deadline for the case.
27. Answer Received: The date the answer was received from the defendant.
28. Calculate Answer Due Date: Dropdown to automatically calculate the due date of the Answer to the Complaint from either the date of service or the date the Affidavit was filed.
29. Extend Time: Tool for recording extensions to the Answer Due date.
30. Show History: Tool for viewing past changes to the Answer Due date.
31. BP/Interrogatories Due: The deadline to serve a bill of particulars or an answer to interrogatories.
32. Critical Deadline? [BP/Interrogatories]: Checkbox indicating whether the deadline to serve a bill of particulars or answer to interrogatories should be considered a critical deadline.
33. BP/Interrogatories Served: The date the bill of particulars or answer to interrogatories was served.
34. Exchanged: The date the bill of particulars or answer to interrogatories was exchanged.
35. Response Received: The date you received a response to your request for a bill of particulars or answers to interrogatories.
36. Comments: Any comments about the statute of limitations and other deadlines.
37. Attach: A button allowing you to upload a document to be linked to the SOL entry.
38. Select: A button allowing you to link a document that has previously been uploaded to the system from the Documents screen to the SOL entry.
39. Document Table: A table showing all linked documents.

The Extend Time Tool and Panel

The Extend Time Tool is a tool field that allows extensions to due date for the Answer to the Complaint to be recorded. To use the tool:

1. Click the Extend Time text under the Answer Due field while in the [Add/Edit SOL Panel](#). This will bring up the Extend Time panel.
2. Fill the fields in with your desired information. See below for details about the fields.
3. Click Save to save the extension and close the panel. The Answer Due field in the [Add/Edit SOL panel](#) will automatically be set to the date in the Extend To field in the Extend Time panel.
 - If you decide you do not wish to save the extension, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The panel contains the following fields

The screenshot shows the 'Extend Time' panel with the following fields and callouts:

- 1: Answer Due: 04/07/2023
- 2: Extend by: 0 days
- 3: Extend To: 04/07/2023
- 4: Waive:
- 5: Stip/Order: --/--
- 6: Comments: (Empty text area)

Buttons: SAVE, CANCEL

1. Answer Due: The answer due date prior to the extension.
2. Extend By: A calculator allowing you to calculate the new due date by a number of days from the original Answer Due date.
3. Extend To: The new answer due date as a result of the extension.
4. Waive: Whether the extension is due to waiving the summons.
5. Stip/Order: The date of the stipulation or order of extension.
6. Comments: Any comments about the extension.

The Show History Tool and Extended Time Table

The Show History Tool is a tool that allows past extensions to the Answer Due field to be viewed. To use the tool, click the Show History text, which will bring up the Extended Time History panel. This panel displays the Extended Time table, which is where the details of past extensions are stored. To close the panel, either click the Close button or the white X in the upper right corner. The Extended time table contains the following columns:

| Answer Due 1 | Extend To 2 | Waive 3 | Stip/Order 4 | Comments 5 |
|--------------|-------------|---------|--------------|------------|
| 4/7/2023 | 5/7/2023 | No | | |

The Critical Deadlines Fields

The Last Date to Serve S&C, Answer Due, and BP/Interrogatories Due fields each have a Critical Deadline field associated with them. If a Critical Deadlines field is newly selected when the SOL is saved, a critical deadline will automatically be created. If the critical deadline has already been created, the field will be selected and uneditable; to deselect the field, you must directly delete the associated critical deadline. (Changes made to the defendant SOL will be reflected as applicable in the associated critical deadlines.) The details of the deadline depend on which of the Critical Deadline fields is selected.

- If Critical Deadlines [S&C] is selected, the critical deadline will be of the type Last Date To Serve S&C, with the defendant to whom the SOL applies in the Party column, the Last Date to Serve S&C in the Due Date column, the Date of Service in the Date Complied column, No in the Waived and Superseded columns, and "created from SOL for S&C Due" in the Comments column.
- If Critical Deadlines [Answer] is selected, the critical deadline will be of the type Answer Due, with the defendant to whom the SOL applies in the Respondent column, one of the plaintiffs in the Party column, the Answer Due date in the Due Date column, the Answer Received date in the Date Complied column, No in the Waived and Superseded columns, and "created from SOL for Answer Due" in the Comments column.
- If Critical Deadline? [BP/Interrogatories] is selected, the critical deadline will be of the type BP/Interrogatories Due, with the defendant to whom the SOL applies in the Party column, the BP/Interrogatories Due date in the Due Date column, the BP/Interrogatories Served date in the Date Complied column, No in the Waived and Superseded columns, and "created from SOL for BP/Interrogatories Due" in the Comments column.

Tolling/Extension Table [Statute of Limitations]

The Tolling/Extension table is where the details of SOL tollings or extensions are stored. The Tolling/Extension table is a subtable of the [Statutes of Limitation Table](#), which means that each row of the Defendant Statutes of Limitation table has an individual Tolling/Extension table associated with it, which is specific to the SOL in that row; open a row of the Defendant Statutes of Limitation table using the open/close icon, represented by an arrow, to reveal (or hide) the associated Tolling/Extension table. Each row of the table represents an individual tolling or extension. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Tolling/Extension table contains the following columns:

| ADD TOLLING/EXTENSION | | Tolling/Extension for Scott, Mike SOL(3 0 0) | | | | | |
|-----------------------|-----------|--|---------------|----------------|-------------------|------------|--|
| Cause 1 | Date 2 | Date Effective 3 | Ending Date 4 | New SOL Date 5 | Tolling Removed 6 | Comments 7 | |
| Agreement | 3/27/2023 | 3/27/2023 | | 3/16/2027 | | | |

1. Cause: What caused the tolling or extension.
2. Date: The date on which the tolling or extension was ordered, triggered, or agreed upon by the parties.
3. Date Effective: The date on which the tolling took effect.
4. Ending Date: The date on which the tolling ceased.
5. New SOL Date: The revised SOL date as a result of the tolling or extension.
6. Tolling Removed: The date on which all effects of tolling were removed.
7. Comments: Any comments about the tolling or extension.
8. [column with no title]: Action icon, containing Edit and Delete.

Editing a Tolling or Extension

To edit a tolling or extension:

1. Click the [right-click icon](#) in the untitled column of the row representing the tolling or extension you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tollings and extensions, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Tolling/Extension Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Tolling or Extension

To delete a tolling or extension:

1. Click the [right-click icon](#) in the untitled column of the row representing the tolling or extension you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the tolling or extension, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Tolling or Extension

To add a new tolling or extension:

1. If the row representing the statute of limitations you wish to add the tolling or extension to is not open (its open/close icon are represented by an arrow, click the open/close icon for the row. This will reveal the Tolling/Extension subtable for that row.
 2. Alternatively, click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to add the tolling or extension to, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Tolling/Extension option in the menu. This will bring up an Add/Edit panel for tollings and extensions, blank except for defaults. Skip to step 4.
 3. Click the Add Tolling/Extension button. This will bring up an Add/Edit panel for tollings and extensions, blank except for defaults.
 4. Fill the fields in with your desired information. See [The Add/Edit Tolling/Extension Panel](#) for details about the fields.
 5. Click Save to save the tolling or extension and close the panel.
- If you decide you do not wish to save the tolling or extension, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Tolling/Extension Panel

The Add/Edit Tolling/Extension Panel allows you to fill in the details of a tolling or extension. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows a dialog box titled "Edit Tolling Extension" with a close button (X) in the top right corner. The dialog contains the following fields:

- 1**: Radio buttons for "Tolling" and "Extension". The "Extension" radio button is selected.
- 2**: Radio buttons for "Law", "Court Order", and "Agreement". The "Agreement" radio button is selected.
- 3**: "Date:" label followed by a date selection dropdown menu.
- 4**: "Date Effective:" label followed by a date selection dropdown menu.
- 5**: "Ending Date:" label followed by a date selection dropdown menu.
- 6**: "New SOL Date:" label followed by a date selection dropdown menu.
- 7**: "Tolling Removed:" label followed by a date selection dropdown menu.
- 8**: "Comments:" label followed by a large text input area.

At the bottom of the dialog are two buttons: "SAVE" and "CANCEL".

1. [field with no prompt (Type)]: Select whether the SOL deadline is being affected by a tolling or an extension.
2. [field with no prompt (Cause)]: Select what caused the tolling or extension.

3. Date: The date on which the tolling or extension was ordered, triggered, or agreed upon.
4. Date Effective: The date on which the tolling or extension took effect.
5. Ending Date: The date on which the tolling or extension ceased.
6. New SOL Date: The revised SOL date as a result of the tolling or extension.
7. Tolling Removed: The date on which all effects of tolling were removed.
8. Comments: Any comments about the tolling or extension.

Plaintiff Statutes of Limitation Table

The Plaintiff Statutes of Limitation table is where the details of plaintiff-centric statutes of limitations are stored. "Plaintiff-centric," in this context, means that the action governed by the statute of limitations would be taken by an individual plaintiff, and is not directly connected to a specific defendant. Among other deadlines, the deadline for filing a no-fault claim in an auto accident should be listed in this table, because the claim is made by a particular plaintiff, but is not directed at a defendant. See the [SOL Types](#) picklist for defining available SOL types, and see the [Case Types](#) administrative page for determining the statutes of limitation that can be added to cases based on the case type, state, and role of the party to which the SOL is connected. Each row of the table represents an individual statute of limitations. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Plaintiff Statutes of Limitation table contains the following columns:

| ADD PLAINTIFF SOL | | | | | | Plaintiff Statutes Of Limitation | | | | | | Export |
|-------------------|--------------|------------------|-----------|---------------|----------|----------------------------------|--|--|--|--|--|--------|
| Plaintiff Name | | SOL Type | SOL Date | Date Complied | Comments | | | | | | | |
| > | Halpert, Jim | No Fault(0 0 30) | 4/15/2023 | | | | | | | | | |
| > | Beasley, Pam | No Fault(0 0 30) | 4/15/2023 | | | | | | | | | |

Page 1 of 1 (2 items) < 1 >

1. Plaintiff Name: The plaintiff to whom the statute of limitations applies.
2. SOL Type: The SOL type (including its length).
3. SOL Date: The deadline of the SOL.
4. Date Complied: The date of compliance with the SOL.
5. Comments: Any comments about the statute of limitations.
6. [column with no title]: The Action icon. The right-click menu contains Edit and Delete.

Editing a Plaintiff SOL

To edit a plaintiff-centric statute of limitations:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for plaintiff-centric statutes of limitations, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Plaintiff SOL Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Plaintiff SOL

To delete a plaintiff-centric statute of limitations:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the SOL, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Plaintiff SOL

To add a new plaintiff-centric statute of limitations:

1. Click the Add Plaintiff SOL button. This will bring up an Add/Edit panel for plaintiff-centric statutes of limitations, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Plaintiff SOL Panel](#) for details about the fields.
 3. Click Save to save the SOL and close the panel.
- If you decide you do not wish to save the SOL, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Plaintiff SOL Panel

The Add/Edit Plaintiff SOL Panel allows you to fill in the details of a plaintiff-centric statute of limitations. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:



Plaintiff Name: * 1 Halpert, Jim

SOL Type: * 2 No Fault(0 0 30)

From Date: 3 03/16/2023 Pick From Date 4

SOL Date: * 5 04/15/2023

Date Complied: 6 04/12/2023

Comments: 7

Created at 3/27/2023 3:21:00 PM by Deifel, Marina.
Modified at 4/3/2023 12:15:00 PM by Deifel, Marina.

SAVE CANCEL

1. Plaintiff Name: The plaintiff to whom the statute of limitations applies.
2. SOL Type: The SOL type (including its length).
3. From Date [any date]: The date from which the SOL begins to be counted.
4. From Date [relevant dates]: The date from which the SOL begins to be counted.
5. SOL Date: The deadline of the SOL.
6. Date Complied: The date of compliance with the SOL.
7. Comments: Any comments about the statute of limitations.

Tolling/Extension Table [Plaintiff]

The Tolling/Extension table is where the details of SOL tollings or extensions are stored. The Tolling/Extension table is a subtable of the [Plaintiff Statutes of Limitation Table](#), which means that each row of the Plaintiff Statutes of Limitation table has an individual Tolling/Extension table associated with it, which is specific to the SOL in that row; open a row of the Plaintiff Statutes of Limitation table using the open/close icon, represented by an arrow, to reveal (or hide) the associated Tolling/Extension table. Each row of the table represents an individual tolling or extension. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Tolling/Extension table contains the following columns:

| ADD TOLLING/EXTENSION | | Tolling/Extension for Halpert, Jim No Fault(0 0 30) | | | | | |
|-----------------------|----------|---|---------------|----------------|-------------------|------------|---|
| Cause 1 | Date 2 | Date Effective 3 | Ending Date 4 | New SOL Date 5 | Tolling Removed 6 | Comments 7 | 8 |
| Agreement | 4/3/2023 | 4/10/2023 | | 4/27/2023 | | | |

1. Cause: What caused the tolling or extension.
2. Date: The date on which the tolling or extension was ordered, triggered, or agreed upon by the parties.
3. Date Effective: The date on which the tolling took effect.
4. Ending Date: The date on which the tolling ceased.
5. New SOL Date: The revised SOL date as a result of the tolling or extension.
6. Tolling Removed: The date on which all effects of tolling were removed.
7. Comments: Any comments about the tolling or extension.
8. [column with no title]: Right click Action icon, containing Edit and Delete.

Editing a Tolling or Extension

To edit a tolling or extension:

1. Click the [right-click icon](#) in the untitled column of the row representing the tolling or extension you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tollings and extensions, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Tolling/Extension Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Tolling or Extension

To delete a tolling or extension:

1. Click the [right-click icon](#) in the untitled column of the row representing the tolling or extension you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.

- If you decide you do not wish to delete the tolling or extension, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Tolling or Extension

To add a new tolling or extension:

1. If the row representing the statute of limitations you wish to add the tolling or extension to is not open (its open/close icon are represented by an arrow), click the open/close icon for the row. This will reveal the Tolling/Extension subtable for that row.
 2. Alternatively, click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to add the tolling or extension to, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Tolling/Extension option in the menu. This will bring up an Add/Edit panel for tollings and extensions, blank except for defaults. Skip to step 4.
 3. Click the Add Tolling/Extension button. This will bring up an Add/Edit panel for tollings and extensions, blank except for defaults.
 4. Fill the fields in with your desired information. See [The Add/Edit Tolling/Extension Panel](#) for details about the fields.
 5. Click Save to save the tolling or extension and close the panel.
- If you decide you do not wish to save the tolling or extension, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Tolling/Extension Panel

The Add/Edit Tolling/Extension Panel allows you to fill in the details of a tolling or extension. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. [field with no prompt (Type)]: Select whether the SOL deadline is being affected by a tolling or an extension.
2. [field with no prompt (Cause)]: Select what caused the tolling or extension.
3. Date: The date on which the tolling or extension was ordered, triggered, or agreed upon.
4. Date Effective: The date on which the tolling or extension took effect.
5. Ending Date: The date on which the tolling or extension ceased.
6. New SOL Date: The revised SOL date as a result of the tolling or extension.
7. Tolling Removed: The date on which all effects of tolling were removed.
8. Comments: Any comments about the tolling or extension.

Critical Deadlines Table

The Critical Deadlines table is where the details of any other deadline of essential importance to the case are stored. Each row of the table represents an individual deadline. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Critical Deadlines table contains the following available columns:

| Critical Deadlines | | | | | | | | | | |
|--------------------------|-----------|-------------------------|---------------------|--------------|------------------|-----------|--------------|------------|---------------------------------|--|
| Criteria 1 | Type 2 | Party 3 | Responsible Party 4 | Due Date 5 | Date Completed 6 | Waived 7 | Superseded 8 | Comments 9 | 10 Actions | |
| <input type="checkbox"/> | Discovery | Production of Documents | Scott, Mike | Beasley, Pam | 7/27/2023 | | No | No | | |
| <input type="checkbox"/> | Discovery | Production of Documents | Scott, Mike | Halpert, Jim | 7/27/2023 | | No | No | | |
| <input type="checkbox"/> | General | Last Date To Serve S&C | Scott, Mike | | 6/29/2023 | 3/15/2023 | No | No | created from SOL for S&C Due | |
| <input type="checkbox"/> | General | Answer Due | Beasley, Pam | Scott, Mike | 5/7/2023 | 4/7/2023 | No | No | created from SOL for Answer Due | |

1. Criteria: The page the deadline was generated from, this defaults to General if the deadlines was created from the Critical Deadlines page.
2. Type: The deadline type.
3. Party: The party or parties to whom the action governed by the deadline is directed.

4. Responsible Party: The party responsible for meeting the deadline.
5. Due Date: The date of the deadline.
6. Date Complied: The date the deadline was met.
7. Waived: Whether the deadline was waived.
8. Superseded: Whether the deadline has been superseded.
9. Comments: Any comments about the deadline.
10. [column with no title]: The right-click menu contains Edit and Delete.

Editing a Critical Deadline

To edit a critical deadline:

1. Click the [right-click icon](#) in the untitled column of the row representing the deadline you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for critical deadlines, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Critical Deadline Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Critical Deadline

To delete a critical deadline:

1. Click the [right-click icon](#) in the untitled column of the row representing the deadline you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the deadline, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Critical Deadline

To add a new critical deadline:

1. Click the Add Critical Deadline button. This will bring up an Add/Edit panel for critical deadlines, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Critical Deadline Panel](#) for details about the fields.
 3. Click Save to save the deadline and close the panel.
- If you decide you do not wish to save the deadline, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Critical Deadline Panel

The Add/Edit Critical Deadline Panel allows you to fill in the details of a critical deadline. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows a dialog box titled "Add Critical Deadline" with the following fields and callouts:

- 1. Radio button for "General" (selected) and "Discovery".
- 2. "Type:" dropdown menu.
- 3. "Responsible Party:" dropdown menu.
- 4. "Requested by:" dropdown menu.
- 5. "Due Date:" dropdown menu showing "04/17/2023".
- 6. "Calculate:" dropdown menu showing "7" days from.
- 7. "days from:" dropdown menu showing "04/17/2023".
- 8. "Date Complied:" dropdown menu.
- 9. "Waived:" checkbox.
- 10. "Superseded:" checkbox.
- 11. "Comments:" text area.
- 12. "SAVE" and "CANCEL" buttons at the bottom.

1. [field with no prompt (Category)]: Which category the critical deadline type is in.
2. Type: The type of the critical deadline.
3. Responsible Party: The party responsible for meeting the deadline.
4. [field with no prompt (Relation to Party)]: How the action governed by the deadline relates to the party to whom it is directed.

5. [field with no prompt (Party)]: The party or parties to whom the action governed by the deadline is directed. The dropdown contains columns for the name of each party and the party's role in the case.
6. Due Date: The date of the deadline. When the selection in this field changes, the Calculate field is automatically set to the difference in days between the date in Days From and the date in this field.
7. Calculate: Used to set the Due Date to a certain number of days after some initial date. When the selection in this field changes, the Due Date field is automatically set to the date in Days From plus the number of days in this field.
8. Days From: Used to set the Due Date to some number of days after a certain initial date. When the selection in this field changes, the Due Date field is automatically set to the date in this field plus the number of days in Calculate.
9. Date Complied: The date the deadline was met.
10. Waived: Whether the deadline was waived. If this field is selected, the critical deadline is not considered outstanding, even if it has not been complied with; i.e., it will not appear in the Pending Critical Deadlines area in the case summary. If this field is selected, the critical deadline will appear as Canceled in the [Calendar](#).
11. Superseded: Whether the deadline has been superseded or not. If this field is selected, the critical deadline is not considered outstanding, even if it has not been complied with; i.e., it will not appear in the Pending Critical Deadlines area in the case summary. If this field is selected, the critical deadline will appear as Adjourned in the Calendar.
12. Comments: Any comments about the critical deadline.

Disbursements

This page is currently under construction. Check back for updates!

[How to make an entry as a credit or refund for disbursement](#)

Documents

This page is currently under construction. Check back for updates!

[Document Shortcuts](#)

Click the links below to access each Document topic:

<https://smartadvocate.atlassian.net/l/c/8gS0H1S1>

<https://smartadvocate.atlassian.net/l/c/qeHKFtCj>

<https://smartadvocate.atlassian.net/l/c/HWP21sfV>

<https://smartadvocate.atlassian.net/l/c/EbQ1VT0H>

<https://smartadvocate.atlassian.net/l/c/UdGE6DrL>

[Templates](#)

[Document Search](#)

[Mass Document Upload](#)

[Unassigned Documents](#)

Use Download feature to 'Copy' Documents

Use Upload to Replace a Document in a Case

Link documents in the case file to specific entries in the case

Insert picture in an email

Emails Screen

This page is currently under construction. Check back for updates!

The Emails page contains all the emails that have been associated with the case. There are two main areas in this page: the table of emails itself, and a preview pane showing the content of the selected email.

The Table

Similar to the [Documents Screen](#) there is a Clear Filter button above the table, which clears any filters currently being applied to the table (the same function as the Clear hypertext in the Filter Builder bar). There is a pair of buttons that allow you to change the location of the preview pane relative to the table (either below the table or to the right of the table). The Display Folders box allows you to view the emails based on the folders to which they have been assigned.

| Item | Description | Category | Review | Sub-Category | Date | From | Direction | To | Origin | Action | | |
|--------------------------|---|---------------|--------|---------------|-------------------|----------------|-----------|----------------|----------|--------|----|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| <input type="checkbox"/> | Mt. Sinai - Beth Israel Med Records Response from Records Dept. (Email) | Exchange Mail | | Email | 3/13/2023 2:06 PM | Delfel, Marina | Incoming | Delfel, Marina | Attached | | | |
| <input type="checkbox"/> | Abstract Records - Beth Israel - Mt. Sinai - Treatment period 1/1/23 - 3/1/23 (Email) | Medical | | Records | 3/15/2023 2:06 PM | Delfel, Marina | Incoming | Delfel, Marina | Attached | | | |
| <input type="checkbox"/> | Police Report Request (email response) (Email) | Exchange Mail | | Email | 3/14/2023 2:03 PM | Delfel, Marina | Incoming | Delfel, Marina | Attached | | | |
| <input type="checkbox"/> | NYPD Accident Report 3/14/23 (Email) | Investigation | | Police Report | 3/14/2023 2:03 PM | Delfel, Marina | Incoming | Delfel, Marina | Attached | | | |

The table has the following available columns:

1. Checkbox: A Checkbox selector column used to select multiple rows of the table for mass actions.

2. Icon: An icon indicating what type of file the email is.
3. Description: A description of the email (typically the Subject line of the email).
4. Category: The email's category.
5. Review: If the email's value to the case has been analyzed, this column will contain an icon indicating the results of the analysis; if the email has been reviewed, this column will contain a check-mark icon that, when hovered over, displays the name of the reviewer and the date and time of the review. The column can contain both types of icons.
6. Sub-Category: The email's subcategory.
7. Date: If the email was created within SmartAdvocate, the date and time that the email was created; otherwise the date and time the email was received in your Outlook inbox.
8. From: The case contact that sent the email.
9. Direction: Either Incoming, Outgoing, or Memo, depending on whether the email was sent from the firm, to the firm, or within the firm.
10. To: The case contact to whom the email was sent.
11. [Exclamation Icon] : The priority level of the email.
12. Origin: The means by which the email entered the SmartAdvocate system. Among the possibilities are Attached and SA Email.
13. Action: A right-click icon. The right-click menu contains the options Open, Copy, Edit Properties, Email, Email Link, Download (rename), Download, Upload, Send to Folder, Share in Client Portal, and Delete.

Additional columns are available for the Emails table, which can be added or hidden from the table by selecting Show/Hide Columns in the Layout button. See [Tables](#) for general information about table structure and usage. The additional available columns are:

1. Actions: A column containing buttons allowing you to open or copy the document, edit the properties of the document or email the document.
2. Att Count: A count of the attachments contained in the email.
3. Comments: Any comments related to the email.
4. Created By: The name of the staff member who added the email to the case.
5. Created Date: The date the email was created as an entry in SmartAdvocate.
6. Delivery Method: The delivery method of the email (by default this is set to Email on this screen).
7. Doc ID: The unique SmartAdvocate ID assigned to the email within the case.
8. Document Modified By: The name of the staff member who modified the email.
9. Document Modified Date: The date the email was modified.
10. Document Path: The file path for that email.
11. Document Type: The type of document (must have a type of Email to appear in this screen).
12. Extension: The extension that generates at the end of the file name when downloaded.
13. From Email: The email address of the case contact who sent the email.
14. Global Doc ID: The unique SmartAdvocate ID assigned to the email across the whole system.
15. Legacy Type:
16. Lock:
17. Properties Modified By: The name of the staff member who modified the properties assigned to the document.
18. Properties Modified Date: The date the properties assigned to the document were modified.
19. Related To: The names of any case contacts marked as related to the document.
20. Reviewed: A checkbox indicating if the email has been reviewed or not.
21. Shared Globally: A checkbox indicating whether the email has been shared in any capacity, via a secure link or the client portal.
22. Shared In Portal: A checkbox indicating whether the email has been shared in the Client Portal.
23. Shared With Everyone: A checkbox indicating whether the email has been shared via a secure link.
24. Tags: Any tags assigned to the email.

Opening an email opens the underlying file using either SmartAdvocate or Outlook, depending on your settings in User Preferences. Copying an email brings up a panel allowing you to choose the case file to copy the email to; there are radio buttons allowing you to choose one of the last ten visited cases (including the case the email is already in), or you can type in a case number directly to copy the email to that case. Selecting Delete brings up a confirmation message (to prevent accidental deletion); clicking OK in the confirmation message deletes the email from the table.

Preview Pane

This area allows you to view the contents of an email without actually opening it. You can change the relative size of the preview pane and the table of emails by dragging the border between them to a point of your choosing. The text in text-based emails will shift to fit horizontally in the pane, though this may cause a need to scroll vertically; images embedded in text-based emails will not be scaled at all, so it may be necessary to scroll vertically or horizontally to see them in their entirety.

The screenshot shows an email interface with a table on the left and a preview pane on the right. The table has columns for 'To' and 'Origin'. The preview pane shows an email header with 'To: Delfel, Marina' and 'Subject: Thank You for Contacting SmartAdvocate, LLC'. The main body of the email is a promotional message from SmartAdvocate. The message includes a logo, a title 'Your Intake Packet Is On The Way!', and a list of items included in the intake packet: A Questionnaire, Retainer Agreement, Medical Authorization Forms, and DVD. It also includes a call to action to return the packet and a link to watch a firm video.

Best regards,
Marina Delfel
SmartAdvocate, LLC

Delfel, Marina Attached

Fees Awarded

The Fees Awarded screen is similar to the Settlement screen, but intended to be used with cases like SSD, VA, WC, etc., where fees are awarded separately from settlements or recoveries.

The Structure of This Page

Fees Awarded/Earned Table

| Fees Awarded/Earned | | | | | | | | | | | Export | 11 |
|---------------------|----------|--------------|------------|---------------|---------------|---------------------|-----------|---------------|----------|--------|--------|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | | |
| Plaintiff | Fee Type | Award Amount | Fee Amount | Disbursements | Net to Client | Earned/Awarded Date | Due Date | Received Date | Comments | Action | | |
| > Marley, Ziggy | SSDI | \$750.00 | \$750.00 | \$0.00 | \$0.00 | 3/6/2023 | 3/20/2023 | 3/17/2023 | | | | |

Page 1 of 1 (1 items) < 1 > LAYOUT

1. Plaintiff: The name of the plaintiff on whose behalf the fee was earned.
2. Fee Type: The type of the fee earned.
3. Award Amount: The amount of the fee awarded.
4. Fee Amount: The amount of the fee received.
5. Disbursements: Any case disbursements to be paid from the fee.
6. Net to Client: Any portion of the fee earned that is due to the client.
7. Earned/Awarded Date: The date on which the fee was earned or awarded.
8. Due Date: The date by which payment of the awarded fee is due.
9. Received Date: The date on which payment of the awarded fee is received.
10. Comments: Any comments on the fee.
11. Action: A right-click icon; the right-click menu contains Edit, Email, Delete, and Print.

Adding a Fee

Clicking on the Add Fee button opens the Add/Edit Fee panel.

Add/Edit Fee

| | | |
|----------------------------|---------------|----|
| Plaintiff* | Marley, Ziggy | 1 |
| Fee Type: | SSDI | 2 |
| Earned/Awarded Date: | 03/06/2023 | 3 |
| Fees Earned by: | Drew, Harry | 4 |
| Due Date: | 03/20/2023 | 5 |
| Received Date: | | 6 |
| Date of Distribution: | | 7 |
| Comments: | | 8 |
| Award Amount: | \$750.00 | 9 |
| Disbursements: | \$0.00 | 10 |
| Net: | \$750.00 | 11 |
| Structure: | | 12 |
| Prior: | \$0.00 | 13 |
| Referrer: | \$0.00 | 14 |
| Other: | \$0.00 | 15 |
| Firm Fee: | \$750.00 | 16 |
| Liens: | \$0.00 | 17 |
| Medical Bills: | \$0.00 | 18 |
| Interest on Disbursements: | \$0.00 | 19 |
| Tax: | \$0.00 | 20 |
| Net To Client: | \$0.00 | 21 |

SAVE CANCEL

1. Plaintiff: The name of the plaintiff on whose behalf the fee was earned.
2. Fee Type: The type of the fee earned.
3. Earned/Awarded Date: The date on which the fee was earned or awarded.
4. Fees Earned By: The attorney at your firm who earned the awarded fee.
5. Due Date: The date by which payment of the awarded fee is due.
6. Received Date: The date on which payment of the awarded fee is received.
7. Date of Distribution: The date on which the fee was distributed to the firm.
8. Comments: Any comments on the fee.
9. Award Amount: The amount of the fee awarded.
10. Disbursements: Any case disbursements to be paid from the fee.
11. Net: The net fee due to the firm.
12. Structure: The portion of any recovery due to the firm as its fee. This field is often left blank on the Fees Awarded page.
13. The amount of the fee due.
14. Prior: Any portion of the fee earned due to a prior attorney.
15. Referrer: Any portion of the fee earned to the attorney who referred the case to your firm.
16. Other: Any portion of the fee earned due to anyone else.
17. Firm Fee: The net fee due to the firm.
18. Liens: Any liens to be paid from the fee. This field is often left blank on the Fees Awarded page.
19. Medical Bills: Any medical bills to be paid from the fee. This field is often left blank on the Fees Awarded page.
20. Interest on Disbursements: Interest to be paid to the firm for any disbursements made. This field is often left blank on the Fees Awarded page.
21. Tax: Any sales tax owed on the fee awarded.
22. Net to Client: The net amount of any award due to the client. This field is often left blank on the Fees Awarded page.

Add Fee Event Sub-Table

The Add Fee Event Sub-Table allows you to add additional details about the fees earned or awarded.

| ADD FEE EVENT | | | Fee Events | | Export | Action |
|---------------|-----------------------|-----------------------|------------|--|--------|--------|
| Date | Event Type | Comments | | | | |
| 4/3/2023 | Attorney Fee Decision | Fee of \$750 awarded. | | | | |

Page 1 of 1 (1 items) < 1 > LAYOUT

1. Add Fee Event button.
2. Date: The date on which the fee payment was received.
3. Event Type: The type of fee event being recorded.
4. Comments: Any comments about the fee.

Adding a Fee Event

By clicking the Add Fee Event button, the following information can be indicated:

Add/Edit Fee Event

Date: 04/03/2023

Event Type: Attorney Fee Deci

Comments: Fee of \$750 awarded.

Created at 4/17/2023 11:43:20 AM by Dreier, Harry.

SAVE **CANCEL**

1. Date: The date on which the fee payment was received.
2. Event Type: The type of fee event being recorded.
3. Comments: Any comments about the fee.

Adding a Fee Check

By clicking the Add Fee Check button, the following information can be indicated:

Add/Edit Fee Check

Fee Check Distribution Check

Amount: \$750.00

Check Date: 04/17/2023

Check Deposited Date: 04/17/2023

Check Received Date: 04/17/2023

Type: Firm/Attorney Fee

Check #: 1234

Expiration Date:

Comments: Fee check received.

Created at 4/17/2023 12:41:47 PM by Dreier, Harry.

SAVE **CANCEL**

1. Checkbox to indicate whether the check was a Fee Check or a Distribution Check. Fee check is selected by default.
2. Amount: The amount of the fee check.
3. Check Date: The date of the fee check.
4. Check Deposited Date: The date on which the fee check was deposited.
5. Check Received Date: The date on which the fee check was received.
6. Type: The type of payment received.
7. Check #: The check number of the fee check.
8. Expiration Date: The date on which the fee check will expire.
9. Comments: Any comments on the fee check.

Incident Screen

The Incident Screen is directly linked to the information gathered during the intake process in Case Wizard. All of the questions asked during intake will be available for review from the Incident screen, along with any notes made in the Incident Facts box during intake, the state where the Incident took place and the date that the Incident took place, as well as any quick injuries selected. This screen may also display additional questions that will not display in the Case Wizard, to be answered after the cases creation.

Incident Details

The top portion of the Incident screen, called the Incident Details section, will allow you to make adjustments to the Incident state, and date (which will in turn automatically update the SOLs on your case) and to the incident facts gathered during intake. There are additional comment boxes available and a dropdown allowing the percentage of the defendant's liability to be set. The Merged Facts field has a merge code associated with it for generating documents, separate from the merge code for the Facts field. The purpose of the Merged Facts field is to provide a place to enter a concise summary of the overall facts suitable for automatic insertion in generated documents, so that the Facts field can be used for the unabridged version.

As new information is gathered, you can always return to the Incident screen to add new information or make adjustments to previously answered questions. Once all necessary additions have been made, select "Save" from the bottom right corner to retain your changes.

The screenshot shows the 'Incident Details' form with the following fields and values:

- Incident State:** NY-New York
- UIM State:** NY-New York
- Incident Date/Time:** 11/29/2021 12:00 AM
- UIM Date/Time:** / / : AM
- Facts:** Rear ended at a stop sign.
- Comments:** (Empty text area)
- Liability Code:** (Dropdown menu)
- Merged Facts:** (Text area)

UDFs

This area is for user-defined fields (UDFs) related to the case. Any Case Wizard UDFs associated with the case type will appear here. Any Incident Wizard UDFs associated with the incident type will also appear here. Any Incident UDFs associated with the incident type will also appear here. See the [UDF Editor](#) administrative page for creating and managing all types of UDFs. See the [Case Groups](#) and [Incident Types](#) picklists for creating incident types and matching them with case groups. You may enter answers to the UDFs in this area, and change or remove any of the answers already provided.

The screenshot shows the 'UDFs' form with the following fields and values:

- Location:** Intersection of broad and main, New York, NY 11007
- City:** (Empty)
- County:** (Empty)
- Test UDF #1:** Yes No Unknown N/A
- Are you receiving assistance? :** Yes No
- Which One(s)?** SSD WC Medicare Medicaid SSI Private Health Insurance
- When is the prescription date?** (Empty)
- Do you have Private Medical Insurance?** Yes No Unknown N/A
- On Job Injury *** Yes No Unknown N/A
- Were you on your employer's property?** Yes No Unknown N/A
- Combobox test:** Combobox test2
- Multiselect Dropdown Test:** (Empty)
- Test:** (Empty)

Quick Injury

This area is for managing the Quick Injuries for each plaintiff. The area contains a dropdown to select a plaintiff, and a set of checkboxes for the Quick Injuries for the chosen plaintiff. You may check and uncheck boxes as necessary to accurately reflect the plaintiff's injuries (as covered by the available Quick Injuries). The Quick Injuries will have been initially assigned when creating the case in the Case Wizard. You can also manage Quick Injuries along with all injuries in the [Injuries](#) page, but on that page you can only add or remove one injury at a time, even Quick Injuries. Here, you can easily select or deselect several Quick Injuries, as appropriate. See the [Quick Injuries](#) administrative page for managing the Quick Injuries available for each case type.

The screenshot shows the 'Quick Injury' form with the following fields and values:

- Plaintiff:** Beasley, Pam
- Arm Injury:**
- Bone fractures:**
- Leg Injury:**
- Psychiatric Injury:**
- Soft Tissue Injury:**

Arm Injury Bone Fractures Leg Injury Psychiatric Injury Soft Tissue Injury
 Back Pain Head Trauma Neck Pain Shoulder Undiagnosed Injury

Investigations

This page is currently under construction. Check back for updates!

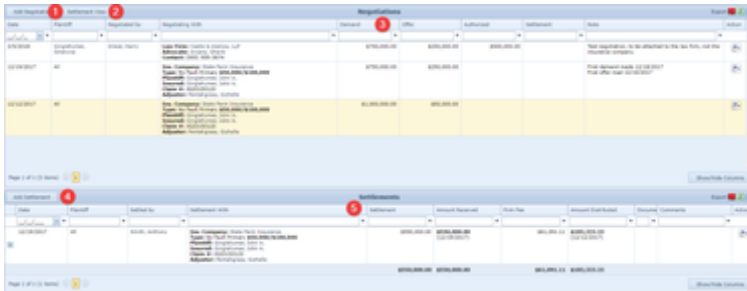
Medical Testing

This page is currently under construction. Check back for updates!

Negotiations/Settlement

The Negotiation/Settlement page allows you to view and record the details of negotiations and settlements with insurance companies and opposing counsel. Some of the information on this page is presented in a simplified format in the [Negotiations and Settlements](#) area of the [Case Summary](#) page, but the Negotiation/Settlement page contains much more thorough information, and is the only place where that information can be directly edited. Note that financial awards due to arbitration or verdicts are also recorded on this page in the Settlement table, even though they are not technically settlements. This manual will follow the convention of the SmartAdvocate system and use "settlement" to describe any outcome resulting in compensation for a plaintiff. To distinguish between actual settlements and other outcomes, use the Settlement Type field in [The Add/Edit Settlement Panel](#).

The Structure of This Page



1. Add Negotiation button. Used to add a new negotiation to the case file. See [Adding a Negotiation](#).
2. Settlement View button. Opens the Settlement View panel, which displays a summary of the case file for use in negotiations. See [Settlement View Panel](#).
3. Negotiation table. Contains the negotiation details and allows various actions to be performed on them. See [Negotiation Table](#).
4. Add Settlement button. Used to add a new settlement to the case file. See [Adding a Settlement](#).
5. Settlement table. Contains the settlement details and allows various actions to be performed on them. See [Settlement Table](#).

Negotiations Panel

Settlement View Panel

The Settlement View panel provides an overview of the information in the case that is likely to be relevant during negotiations. The panel includes information from various other case pages in SmartAdvocate. To open the panel, click the Settlement View button. To close it, click the Close button or the white X in the upper right corner of the panel. The panel contains the following sections:

Settlement View X

Plaintiff: Ginglehymer, John A. Ginglehymer, Smeryna Marks, Rodney 1

Incident Facts: 2 NYC Police and Firefighters responded to reports of a traffic collision; involving a pedestrian being struck by a vehicle; at Avenue 52 X Grapefruit Boulevard in Manhattan. Police and Firefighters arrived on scene and confirmed one victim perished. The NYC Police Department (NYPD) is overseeing the investigation.

Injuries: 3 Amputation
Displaced Fracture Surgery
Adrenal Glands Contusion Tongue Cancer Antibiotic Therapy, Computed Axial Tomography, Ultrasound
Hand Pain
Head, Neck & Back Pain

Coverage: 4

| Ins. Co. | Ins. Type | Adjuster | Insured Name | Policy Limit |
|----------------------|------------------|----------------------|---------------------|---------------------|
| GEICO | Collision | John Kramer | Mary Ripspeed | \$100,000/\$300,000 |
| GEICO | Health Insurance | | | \$0.00/\$0.00 |
| State Farm Insurance | No Fault Primary | Gizhelle Pentahgrass | John A. Ginglehymer | \$50,000/\$100,000 |

Lienors: 5

| Lienor Name | Lienor Type | Lienor Amount | Comments |
|----------------------------------|-----------------|---------------|----------|
| Smart Litigator | Funding Company | \$1,500.00 | |
| GEICO | Medicaid | \$250.00 | |
| Doe, John | Doctor | \$12,000.00 | |
| Doe, John | Med Pay | \$1,000.00 | |
| Good Samaritan Memorial Hospital | Disability | \$0.00 | |

| | |
|----------------|------------------------|
| Disbursements: | \$5,946.76 |
| Last Demand: | \$750,000 (12/19/2017) |
| Last Offer: | \$250,000 (12/19/2017) |

1. Plaintiff: This section contains a **Radio button** field with an option for each plaintiff in the case. Select the plaintiff whose information you wish to see; all other sections show only the information pertaining to the selected plaintiff.
2. Incident Facts: This section contains the Incident Facts field from the **Incident** case page.
3. Injuries: This section contains information from the Injuries Summary column in a table with two segments taken from the **Injuries** case page. The first segment is taken from the Injuries Summary column of the Injuries Summary table; the second is taken from the Injury and Description columns of the Injury Details sub-table.
4. Coverage: This section contains a table with five columns taken from the Insurance Companies tables in the Plaintiff Insurance and Defendant Insurance case pages. The table excludes duplicate records and records from the Plaintiff Insurance page that cover a plaintiff other than the selected one, but it includes third-party administrators as separate rows. The Ins. Co. column is taken from the Insurance Company column of the source table (or the first line of the 3rd Party Insurance column for third-party administrators); the Ins. Type column is taken from the Insurance Type column; the Adjuster column is taken from the Adjuster column (or the Adjuster line of the 3rd Party Insurance column for third-party administrators); the Insured Name is taken from the first line of the Policy Info column; and the Policy Limit column is taken from the Limits line of the Policy Info column for defendant insurance companies, or the UM/SUM Limits line of the Policy Info column for plaintiff insurance companies.
5. Lienors: This section contains a table with four columns taken from the **Lienor Table** on the **Lien Tracking** case page. The Lienor Name column is taken from the Lienor column of the source table; the Lienor Type column is taken from the Lienor Type column of the source table; the Lienor Amount column is taken from the Negotiated line of the Amounts column; and the Comments column is taken from the Comments column.
6. Disbursements: This section contains the number in the Total column for the selected plaintiff on the Disbursements case page.
7. Last Demand: This section contains the number in the Demand column of the Negotiation Page with the latest date in the Date field of all those that involve the plaintiff, ignoring those where the Demand column is blank or contains \$0.00.
8. Last Offer: This section contains the number in the Offer column of the Negotiation Page with the latest date in the Date field of all those that involve the plaintiff, ignoring those where the Offer column is blank or contains \$0.00.

Negotiation Table

The Negotiation table is where the details of negotiations are stored. Each row of the table represents an individual round of negotiation. See **Tables** for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Negotiation table contains the following available columns:

| Add Negotiation | | Settlement View | | Negotiations | | | | | | Export |
|-----------------|----------------------|-----------------|--|----------------|--------------|--------------|------------|--|--------|--------|
| Date | Plaintiff | Negotiated by | Negotiating With | Demand | Offer | Authorized | Settlement | Note | Action | |
| 3/3/2018 | Gingrehymes, Smeryna | Onick, Harry | Law Firm: Castle & Alamos, LLP Advocate: Ariana, Oriana Contact: (552) 535-2674 | \$750,000.00 | \$250,000.00 | \$500,000.00 | | Test negotiation, to be attached to the law firm, not the insurance company. | | |
| 12/19/2017 | All | | Ins. Company: State Farm Insurance Type: No Fault Primary \$50,000/\$100,000 Plaintiff: Gingrehymes, John A. Insured: Gingrehymes, John A. Claim #: 3020150120 Adjuster: Pentahpress, Gihelle | \$750,000.00 | \$250,000.00 | | | First demand made 12/18/2017 First offer made 12/19/2017 | | |
| 12/12/2017 | All | | Ins. Company: State Farm Insurance Type: No Fault Primary \$50,000/\$100,000 Plaintiff: Gingrehymes, John A. Insured: Gingrehymes, John A. Claim #: 3020150120 Adjuster: Pentahpress, Gihelle | \$1,000,000.00 | \$50,000.00 | | | | | |

1. Date: The date of the negotiation.
2. Plaintiff: The plaintiff whose settlement was being negotiated.
3. Staff: The staff member who conducted the negotiation.
4. Negotiating With: The details of the company being negotiated with (for insurance companies: the name of the company, insurance type, policy limits, relevant defendant or plaintiff, name of insured, claim number, and adjuster name and phone number; for law firms, the name of the firm and the attorney name (Advocate) and phone number).
5. Demand: The amount of the demand made by your firm during the negotiation.
6. Offer: The amount of the offer made by the insurance company or attorney during the negotiation.
7. Authorized: The amount the plaintiff authorized your firm to accept.
8. Settlement: The amount of the settlement reached during the negotiation.
9. Note: Any comments about the negotiation.
10. Action: Right-click icon; right-click menu contains Edit, Email, Delete, and Print.

Editing a Negotiation

To edit a negotiation:

1. Click the **right-click icon** in the Action column of the row representing the negotiation you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for negotiations, with the existing information filled in.
 3. Fill the fields in with your desired information. See **The Add/Edit Negotiation Panel** for details about the fields.
 4. Click Save (for a new Negotiation) or Update (if editing an existing Negotiation) to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - If you wish to email the details of the negotiation at the same time as you save the changes, click Save & Email or Update and Email instead of clicking Save or Update to save the changes, which will close the Add/Edit panel, and open the case email panel, using the **[Negotiation]** email template, with the details of the negotiation automatically included in place of negotiation merge codes. Fill out the email with any desired additional content and click Send to send the email, or click the white X at the upper right of the panel instead of clicking Send to close the panel without sending the email. See the **Email/Note Templates** administrative page for managing email templates.

Deleting a Negotiation

To delete a negotiation:

1. Make sure there is no settlement linked to the negotiation. If the Settlement column in the row representing the negotiation you wish to delete is not blank, there is a settlement linked to the negotiation. See [The Settlement Field](#) for details about linked settlements, and see [Deleting a Settlement](#) to first delete the settlement linked to the negotiation, if there is one.
 2. Click the [right-click icon](#) in the Action column of the row representing the negotiation you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 4. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the negotiation, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Negotiation

To add a new negotiation:

1. Click the Add Negotiation button. This will bring up an Add/Edit panel for negotiations, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Negotiation Panel](#) for details about the fields.
 3. Click Save to save the negotiation and close the panel.
- If you decide you do not wish to save the negotiation, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Emailing a Negotiation

To email the details of a negotiation:

1. Click the [right-click icon](#) in the untitled column of the row representing the negotiation whose details you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Email option in the menu. This will open the Case Email panel, using the **[Negotiation]** email template, with the details of the negotiation automatically included in place of negotiation merge codes.
 3. Fill out the email with any desired additional content. See the [Email/Note Templates](#) administrative page for managing email templates.
 4. Click Send to send the email.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Negotiation

To print the details of a negotiation:

1. Click the [right-click icon](#) in the untitled column of the row representing the negotiation whose details you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Print option in the menu. This will open a new tab containing only the details of the negotiation, and immediately bring up your browser's print options for that tab.
 3. Select the print options you desire and print the negotiation details. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
- Note that after printing, the tab containing only the details of the negotiation will remain open. You may close this if you wish.

The Add/Edit Negotiation Panel

The Add/Edit Negotiation Panel allows you to fill in the details of a negotiation. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Form' window for a negotiation. It contains the following fields and sections:

- Table:** A table with columns: Insurance Co./Law Firm, Adjuster/Attorney, Phone, Insurance Type, and Plaintiff/Defendant. It lists several entries, with 'State Farm Insurance' highlighted.
- Date:** A dropdown menu set to 12/19/2017.
- Negotiated by:** A dropdown menu set to Dreac, Harry.
- Plaintiff:** A dropdown menu set to All.
- Authorized:** A text input field set to \$500,000.
- Demand:** A text input field set to \$750,000.
- Offer:** A text input field set to \$250,000.
- Settlement:** A text input field set to \$0.
- Note:** A text area containing the text: 'First demand made 12/18/2017' and 'First offer made 12/19/2017'.
- Settlement Calculation Based on the Offer:** A section with various input fields: Disbursements (\$0.00), Net (\$250,000.00), Gross Attorney Fee (From Gross/Net), Prior (\$0.00), Referrer (\$0.00), Other (\$0.00), Firm Fee (\$0.00), Liens (\$0.00), Medical Bills (\$0.00), Interest on Disbursements (0%), and Net To Client (\$250,000.00).
- Buttons:** Update, Update & Email, and Cancel.

1. Negotiating with: Radio buttons that allow you to choose the company or law firm being negotiated with.
2. Date: The date of the negotiation.
3. Negotiated by: The staff member who conducted the negotiation.

4. Plaintiff: The plaintiff whose settlement was being negotiated.
5. Authorized: The amount the plaintiff authorized your firm to accept.
6. Demand: The amount of the demand made by your firm during this negotiation.
7. Offer: The amount of the offer made by the company or law firm during the negotiation.
8. Settlement: The amount of the settlement reached during the negotiation. An exclamation mark (!)



) indicates that the data in this field is different from the data for this plaintiff in the Settlement table. For additional details, see The Settlement Field.

9. Note: Any comments about the negotiation.



10. Settlement Calculation Based on the Offer: This is a separate section of the Add/Edit Negotiation Panel, used to determine the approximate amount the plaintiff will receive based on a specific settlement amount. The information for most of the fields are taken from information in other pages in the system. You can refresh the data in those fields by clicking on the refresh icon () to the right of that field. An exclamation mark (!) indicates that the data in the field from which this data is taken is different than the amount presently seen on this page for that field. Click on the refresh icon to obtain the most current data from the source page. You can manually enter data into many of these fields, however if the amount is different than the amount on the source page, an exclamation mark will appear to the right of the field. To pull in the latest amount from the source page, simply click on the refresh icon.

Settlements Panel

The Settlement Field

The Settlement field in the Add/Edit Negotiation Panel has an additional purpose beyond being used for the Settlement column in the Negotiation table. If a negotiation is saved with a number other than zero in the Settlement field, and there is not already a settlement linked to that negotiation, a new settlement will be added to the Settlement table, with the Date, Plaintiff, Staff, Settlement With, and Settlement columns matching the negotiation's Date, Plaintiff, Staff, Negotiating With, and Settlement columns respectively, and with the Firm Fee column containing \$0.00 because it cannot be blank. This new settlement is considered linked to the negotiation, though there is no additional indication of the link.

Any edits to the Settlement field in the negotiation, or to the Gross Settlement Amount field in the settlement, will be reflected in the Settlement column in both the linked negotiation and settlement. Edits to any other field in the negotiation will not be reflected in the linked settlement, nor will edits to any other field in the settlement be reflected in the linked negotiation.

A negotiation cannot be deleted if a settlement is linked to it. Deleting a linked settlement will cause the Settlement column in the linked negotiation to become blank; it will then be possible to delete the negotiation.

Settlement Table

The Settlement table is where the details of settlements are stored. Each row of the table represents an individual settlement. See Tables for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Settlement table contains the following available columns:

| Add Settlement | | Settlements | | | | | | | | | | | Export |
|----------------|---------------------|------------------|---|--------------|-----------------|-------------|-------------|----------------------------|----------------------------------|----------------|----------|--------|--------|
| Date | Plaintiff | Settled by | Settlement With | Settlement | Amount Received | Type | Firm Fee | Fee Recorded | Amount Distributed | Escrow Account | Comments | Action | |
| 7/2/2018 | Ginghlymer, John A. | Vogelsberg, Karl | Ins. Company: GEICO Type: Collision \$100,000/\$300,000 Defendant: Ruppel, Mary Insured: Ruppel, Mary Claim #: GE5435354 Adjuster: Kramer, John, Tel: (903) 855-4578 | \$300,000.00 | | Negotiation | \$26,650.66 | | | | | | |
| 6/29/2018 | All | Vogelsberg, Karl | Ins. Company: GEICO Type: No Fault Primary \$100,000/\$300,000 Defendant: Speltz, Mary-Ann Insured: Speltz, Mary-Ann Claim #: 95163 Adjuster: Singer A., Tel: (516) 496-5173 | \$300,000.00 | \$300,000.00 | Negotiation | \$99,980.00 | \$99,980.00 (6/29/2018) | \$300,000.00 (multiple dates) | | | | |

1. Date: The date the settlement was reached.
2. Plaintiff: The plaintiff whose claim was settled.
3. Settled by: The staff member who reached the settlement.
4. Settlement With: The details of the company being settled with (for insurance companies: the name of the company, insurance type, policy limits, relevant defendant or plaintiff, name of insured, claim number, and adjuster name and phone number; for law firms, the name of the firm and the attorney name and phone number).
5. Settlement: The amount of the settlement. The sum of this column across all rows in the table appears below the last row of the column.
6. Amount Received: The total amount of all checks received in connection with the settlement and the date of the check. If there is only one check, this column lists the date of the check; if there is more than one, it only indicates that there are multiple dates. The sum of the amount in this column across all rows in the table appears below the last row of the column.
7. Type: The type of outcome being recorded as a settlement.
8. Firm Fee: The net fee earned by your firm from the settlement. The sum of this column across all rows in the table appears below the last row of the column.
9. Fee Recorded: The total amount of all money actually taken in and recorded as fees from the settlement and the date the fee intake was recorded. If there is only one recorded intake, this column lists the date of the intake; if there is more than one, it only indicates that there are multiple dates. The sum of the amount in this column across all rows in the table appears below the last row of the column.
10. Amount Distributed: The total amount of all checks issued in connection with the settlement and the date of the check. If there is only one check, this column lists the date of the check; if there is more than one, it only indicates that there are multiple dates. The sum of the amount in this column across all rows in the table appears below the last row of the column.
11. Escrow Account: The firm escrow account into which the settlement was deposited, and from which it was distributed.
12. Comments: Any comments about the settlement
13. Action: A [Right-click icon](#); the right-click menu contains Edit, Email, Delete, and Print.

Editing a Settlement

To edit a settlement:

1. Click the [right-click icon](#) in the Action column of the row representing the settlement you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for settlements, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Settlement Panel](#) for details about the fields.
 4. Click Update to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - If you wish to email the details of the settlement at the same time as you save the changes, click Update & Email instead of clicking Update to save the changes, close the Add/Edit panel, and open the case email panel, using the **[Settlement]** email template, with the details of the settlement automatically included in place of settlement merge codes. Fill out the email with any desired additional content and click Send to send the email, or click the white X at the upper right of the panel instead of clicking Send to close the panel without sending the email. See the [Email/Note Templates](#) administrative page for managing email templates.

Deleting a Settlement

To delete a settlement:

1. Click the [right-click icon](#) in the Action column of the row representing the settlement you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the settlement you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
 3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 4. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the settlement, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Settlement

There are two ways to add a new settlement. One is to link a settlement to an existing negotiation; see [The Settlement Field](#) for details. The other way is as follows:

1. Click the Add Negotiation button. This will bring up an Add/Edit panel for settlements, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Settlement Panel](#) for details about the fields.
 3. Click Save to save the settlement and close the panel.
- If you decide you do not wish to save the settlement, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Emailing a Settlement

To email the details of a settlement:

1. Click the [right-click icon](#) in the untitled column of the row representing the settlement whose details you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Email option in the menu. This will open the Case Email panel, using the **[Settlement]** email template, with the details of the settlement automatically included in place of settlement merge codes.
 3. Fill out the email with any desired additional content. See the [Email/Note Templates](#) administrative page for managing email templates.
 4. Click Send to send the email.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

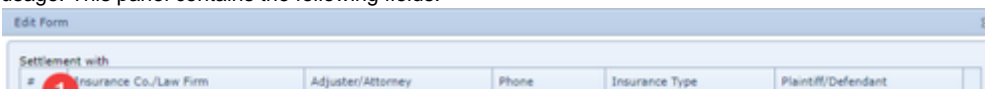
Printing a Settlement

To print the details of a settlement:

1. Click the [right-click icon](#) in the untitled column of the row representing the settlement whose details you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the Print icon in the Actions column of the row representing the settlement whose details you wish to print. This will open a new tab containing only the details of the settlement, and immediately bring up your browser's print options for that tab. Skip to step 3.
2. Click the Print option in the menu. This will open a new tab containing only the details of the settlement, and immediately bring up your browser's print options for that tab.
3. Select the print options you desire and print the settlement details. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing only the details of the settlement will remain open. You may close this if you wish.

The Add/Edit Settlement Panel

The Add/Edit Settlement Panel allows you to fill in the details of a settlement. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



The screenshot shows a web browser window titled "Edit Form". Below the title bar is a table with the following structure:

| Settlement with | | | | | |
|-----------------|------------------------|-------------------|-------|----------------|---------------------|
| # | Insurance Co./Law Firm | Adjuster/Attorney | Phone | Insurance Type | Plaintiff/Defendant |
| 1 | | | | | |

1. Settlement with: Radio button list allowing you to choose the company being settled with. The list contains six columns: the radio button, the name of the company, the name of the adjuster or attorney, the primary phone number of the adjuster or the law firm, the insurance type (insurance companies only), and the plaintiff or defendant covered (insurance companies only).
2. Date: The date the settlement was reached.
3. Plaintiff: The plaintiff connected to the settlement.
4. Settled by: The staff member in your firm who settled the case.
5. Settlement Type: Whether the settlement was obtained through Negotiation, Arbitration, or a Judgment.
6. Escrow Account: Into which of your firms escrow account the settlement funds have been deposited.
7. Release To Client: The date the settlement and release agreement was sent to the client for signature.
8. Release From Client: The date the signed settlement and release agreement was received from the client.
9. Release To Ins./Att.: The date the signed settlement and release agreement was sent to the insurance company or law firm with which the case was settled.
10. Check Expected Date: The date the settlement check is expected to be received by your firm. When the date in this field is changed, and the Release To Ins./Att. field is not blank, the Days from Release field is automatically set to the difference in days between the Release To Ins./Att. field and this field.
11. Days from Release: The number of days after sending the signed settlement and release agreement to the company being settled with that a settlement check is expected to be received by your firm. When the number in this field is changed, and the Release To Ins./Att. field is not blank, the Check Expected Date field is automatically set to the date in the Release To Ins./Att. field plus the number of days in this field.
12. Date Of Distribution: The date your firm sent the amount due to the plaintiff.
13. Comments: Any comments about the settlement.



14. Settlement Calculation: This is a separate section of the Add/Edit Settlement Panel, used to determine the amount the plaintiff will receive based on a specific settlement amount. The information for most of the fields are taken from information in other pages in the system. You can refresh the data in those fields by clicking on the refresh icon () to the right of that field. An exclamation mark () indicates that the data in the field from which this data is taken is different than the amount presently seen on this page for that field. Click on the refresh icon to obtain the most current data from the source page. You can manually enter data into many of these fields, however if the amount is different than the amount on the source page, an exclamation mark will appear to the right of the field. To pull in the latest amount from the source page, simply click on the refresh icon.

Checks Panel

The Checks Sub-Table Fields

The Checks Sub-Table contains information about all checks received by your firm in partial or full settlement of the case, as well as all checks issued by your firm in order to distribute the settlement funds. The Checks Sub-Table can be opened by clicking on the plus sign (



) to the left of the relevant row of the mail table. The sub-table columns that are available in the Checks sub-table are the following:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
|---------|------------|----------------|----------------|--------|---------|---|--------------|--------------|--------------|---------------|--------|------------|----------|----------|--------|----|
| Check # | Date | Amount | Balance | Status | Check # | Payee | Custom Payee | Debit | Credit | Type | Hailed | Expiration | Received | Comments | Action | |
| | 6/15/2018 | (\$142,024.46) | (\$162,024.46) | Review | | Robinson, Terry-Ann L. | | \$162,024.46 | | Plaintiff | | | | | | |
| | 6/15/2018 | (\$166,666.66) | (\$328,691.12) | Review | | SmartAdvocate, LLC | | \$166,666.66 | | Firm Fee | | | | | | |
| | 6/15/2018 | (\$3,648.84) | (\$332,339.96) | Review | | SmartAdvocate, LLC | | \$3,648.84 | | Disbursements | | | | | | |
| | 6/15/2018 | (\$8,000.00) | (\$340,339.96) | Hold | | Independent Medical Examinations, PC | | \$8,000.00 | | Lien | | | | | | |
| | 6/15/2018 | (\$15,000.00) | (\$355,339.96) | Hold | | Home Health Associates of Greater New York, LLC | | \$15,000.00 | | Lien | | | | | | |
| | Settlement | \$100,000.00 | (\$255,339.96) | | | | | | \$100,000.00 | Settlement | | | | | | |

| | | | | | | | | |
|-----------------------|--------------|--------------|--|--------------|--------------|------------|-------------------|--|
| Settlement | \$400,000.00 | \$144,660.04 | | | \$400,000.00 | Settlement | | |
| \$144,660.04 | | \$355,339.96 | | \$500,000.00 | | | | |
| Page 1 of 1 (7 items) | | | | | | | Show/Hide Columns | |

- [unlabeled column]: Checkbox selection, allowing the selection of one or more rows for Mass Status Change.
- [unlabeled column]: Whether the check was received as a settlement or paid as a disbursement from the settlement.
- Date: The date the check was received or issued by your firm.
- Amount: The amount of the check.
- Balance: The total balance of the settlement remaining after the check was received or issued by your firm.
- Status: Whether the check has been cashed or deposited and cleared the issuing bank, printed, is being held, or has been sent to be printed within your firm.
- Check #: The number of the check.
- Payee: The name of the contact to whom the check was payable.
- Custom Payee: This field can be entered manually. It is not currently used in SmartAdvocate, but may be utilized by the QuickBooks integration in a future release.
- Debit: The amount of a check that was received by your firm.
- Credit: The amount of a check that was issued by your firm.
- Type: The aspect of the money due that the check is meant to pay for.
- Mailed: The date on which the check was placed in the mail by your firm.
- Expiration: The date on which the settlement expires if not effectuated.
- Received: The date on which the check was received by your firm.
- Comments: Any comments about the check.
- Action: A [Right-click icon](#); the right-click menu contains Edit, and Delete.

The Continue Negotiations Feature

Enter and track Distribution Checks automatically on the Settlement Screen

Notes Screen

This page is currently under construction. Check back for updates!

Make Use of The Additional Features Available With Your Notes Entry

Photographs Screen

This page is currently under construction. Check back for updates!

Shared Documents

This page is currently under construction. Check back for updates!

Shared Forms

This page is currently under construction. Check back for updates!

Social Security Disability

This page is currently under construction. Check back for updates!

Retainer/Referral

This page is currently under construction. Check back for updates!

The Referral Fee is Automatically Calculated on the Settlement Screen

Tasks

The Tasks page allows you to view and record the details of all tasks that have been entered in the case.

The Structure of This Page

| ADD NEW TASK 1 | Tasks | | | | | | | | | | Export | |
|---|-----------|--------------|------------------------|---|-----------|----------------|-------------|-----------|--------|--|--------|--|
| <input type="checkbox"/> | Due date | Created date | Type | Subject | Requestor | Assigned To | Status | Documents | Action | | | |
| <input type="checkbox"/> | 4/11/2023 | 4/11/2023 | PreLitigation | Generate New Case Opening Package | | Delfel, Marina | Not Started | | | | | |
| <input type="checkbox"/> | 4/11/2023 | 4/11/2023 | PreLitigation | Verify Client's Receipt of Medicare/Medicaid Benefits | | | Not Started | | | | | |
| <input type="checkbox"/> | 4/11/2023 | 4/11/2023 | PreLitigation | Request Scar Photographs of Client's Injury | | | Not Started | | | | | |
| <input type="checkbox"/> | 4/11/2023 | 4/11/2023 | WorkPlan Decision Task | Answer Received? | | | Not Started | | | | | |

1. Add New Task button. Used to add a new task to the case file. See Adding a Task.
2. Tasks table. Contains the tasks details and allows various actions to be performed on them. See Tasks Table.

Tasks Table

The Tasks table is where the details of tasks are stored. Each row of the table represents an individual task. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Tasks table contains the following available columns:

| 1 <input type="checkbox"/> | 2 Due date | 3 Type | 4 Subject | 5 Requestor | 6 Assigned To | 7 Status | 8 Documents | 9 Action |
|---|---|---|--|--|--|---|--|---|
| <input type="checkbox"/> | | | Follow-Up with Client to make sure they | | | | | |

| | | | | | | | | |
|--------------------------|-----------|---------------|--|-----------------------|----------------|-------------|-----------------------------|--|
| <input type="checkbox"/> | 3/1/2023 | Follow-Up | understand lit process moving forward | Deffel, Marina | Vallines, Jose | Not Started | | |
| <input type="checkbox"/> | 6/12/2023 | Litigation | Review Initial Draft of RFP | Deffel, Marina | Deffel, Marina | Not Started | Def. Request for Production | |
| <input type="checkbox"/> | 5/11/2023 | PreLitigation | Defendant's Insurance Carrier Information Received | Simpson, Claude, Esq. | Deffel, Marina | Not Started | | |
| <input type="checkbox"/> | 4/11/2023 | PreLitigation | Generate New Case Opening Package | Rosmarin, Max Z. | Deffel, Marina | Not Started | | |

1. **Checkbox:** A checkbox column allowing you to select and edit multiple tasks at once.
2. **Due Date:** The date by which the task is scheduled to be completed.
3. **Type:** The type of the task.
4. **Subject:** The subject of the task.
5. **Requestor:** The name of the staff member who requested that the task be completed.
6. **Assigned To:** The staff member to whom the task is assigned for completion.
7. **[Exclamation Point Icon]:** The priority of the task.
8. **Status:** The status of the task.
9. **Documents:** A link to any document attached to the task.
10. **Action:** A [Right-click icon](#); the right-click menu contains Edit and History.

Additional columns are available for the Tasks table, which can be added by clicking on the Show/Hide Columns button in the Layout Menu. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are:

1. **Actions:** An [edit icon](#) allowing you to edit the task.
2. **CC To:** The name of the staff member CC'd on the task.
3. **Complete Date:** The date the task was completed.
4. **Completion Note:** The note created in the system prompt when marking the task complete.
5. **Created By:** The name of the staff member who created the task.
6. **Created Date:** the date the task was created.
7. **Description:** The description of the task.
8. **Marked Task Complete:** The name of the staff member who marked the task as complete.
9. **Start Date:** The start date of the task.

Editing a Task

To edit a task:

1. Click the [right-click icon](#) in the Action column of the row representing the task you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the task you wish to edit. This will bring up an Add/Edit panel for tasks, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tasks, with the existing information filled in.
3. Fill the fields in with your desired information. See The Add/Edit Tasks Panel for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Task

To delete a task:

1. Click the [right-click icon](#) in the Action column of the row representing the task you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the task you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the task, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

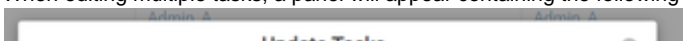
Actions for Multiple Tasks:

To take an action for multiple tasks:

1. Select the checkboxes of all tasks you would like to edit.
2. Click the [right-click icon](#) or right click anywhere in the rows representing the tasks you would wish to edit. This will bring up a menu of options.
 - a. The options in the menu are:
 - i. Edit Selected
 - ii. Copy Selected To Another Case
 - iii. Mark Selected Completed
 - iv. Mark Selected Not Started
 - v. Mark Selected Cancelled
 - vi. Mark Selected In Progress
 - vii. Delete Selected
3. Click the OK button that appears at the top of the screen to confirm the action if marking tasks as Not Started, Cancelled, In Progress or when deleting.

Editing Multiple Tasks Panel

When editing multiple tasks, a panel will appear containing the following fields:



1. Priority: Changes the priority assigned to all selected tasks.
2. Status: Changes the status assigned to all selected tasks.
3. Task Requestor: Changes the individual staff member responsible for requesting all selected tasks.
4. Send Email Checkbox [Task Requester]: Sends an email to the staff member being reassigned as the Task Requester notifying them of the new assignment for each task selected.
5. Assigned To: Changes the individual staff member responsible for completing all selected tasks.
6. Send Email Checkbox [Assigned To]: Sends an email to the staff member being assigned to the tasks notifying them of the new assignment for each task selected.
7. Due Date: Changes the due date assigned to the selected tasks.

Adding a Task

To add a new task:

1. Click the Add New Task button. This will bring up an Add/Edit panel for tasks, blank except for defaults.
2. Fill the fields in with your desired information. See The Add/Edit Task Panel for details about the fields.
3. Click Save to save the task and close the panel.
 - If you decide you do not wish to save the task, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Task Panel

The Add/Edit Task Panel allows you to fill in the details of a task and contains the following fields:

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|------|-------------|-----------|--------------|--------|------|----|-----------|---------|
| | Demand | Defendant | | | | | | |

| | | | | | | | | |
|-----------------------|-----------------------------|-----------------------------|--------|----------|--------------------|-------|----------|-----|
| PDF | Defendant Letter - BI GEICO | Defendant Insurance Company | Letter | Attached | SmartAdvocate, LLC | GEICO | Outgoing | ⏪ ⏩ |
| 23 | | | | | | | | |
| SAVE & MARK COMPLETED | | | | | SAVE | | CANCEL | |

1. Preselected for this case (based on case type and status) [Radio button]: A radio button that when selected allows you to see task templates predetermined for the case based on its type and status.
2. Task Template Dropdown: A dropdown containing the different task templates matching the criteria selected in items 1, 3 or 5.
3. Task Template Group [Radio button]: A radio button that when selected allows you to see task templates assigned to the Task Template Group selected in item
4. Task Template Group: A dropdown containing different Task Template Groups, selecting one of these groups will limit the options that appear in the Task Template Dropdown (item 3).
5. All Task Templates [Radio button]: A radio button that when selected allows you to see all task templates.
6. Type: The type of task being assigned.
7. Priority: The priority of the task.
8. Status: The current status of the task.
9. Subject: The subject of the task.
10. Time Spent: The amount of time spent completing the task.
11. Start Date: The date the task is to be started (typically the date the task was created).
12. Due Date: The date by which the task must be completed.
13. Days from start date: The number of days from the start date until the due date, during which the task must be completed. This number is automatically calculated based upon the start and due dates entered. If this number is changed, the due date will be changed to reflect the number of days entered from the start date.
14. Description: Any description of the task.
15. Task Requestor: The individual who requested that the task be completed. By default, the requestor will be the staff member who created the task.
16. Send Email [Requestor]: Whether to send an email to the Task Requestor upon creation or editing of the task.
17. Task Back: Switches the Requestor and Assigned, so that the staff member who was the Task Requestor before is now the Assigned and the Assigned is now the requestor.
18. Assigned To: The individual to whom the task has been assigned. By default, the task will be assigned to the staff member who created it.
19. Send Email [Assigned To]: Whether to send an email to the staff member to whom the task has been assigned upon creation or editing of the task.
20. CC To: Any staff members to whom you want emails sent upon creation or editing of the task.
21. Attach: A button allowing you to upload a document to be linked to the task.
22. Select: A button allowing you to link a document that has previously been uploaded to the system from the Documents screen to the task.
23. Document Table: A table showing all linked documents.

Timeline

This page is currently under construction. Check back for updates!

[Make use of the Case Timeline Video](#)

[Make use of the Case Timeline](#)

UDF Pages

UDF pages are created entirely from custom questions called User Defined Fields (UDF) in SmartAdvocate and are extremely useful in gathering information not stored in the traditionally, hardcoded fields created by SmartAdvocate.

For more information on creating UDFs please see our help page on the [UDF Editor](#).

The following pages are all listed as custom UDF pages in the system and can be added to cases using the [Case Menu Configurator](#):

- Case UDFs
- Court UDFs
- Defendant UDFs
- Expert UDFs
- Plaintiff Fact Sheet
- Plaintiff UDFs
- UDfs #1
- UDfs #2
- UDfs #3
- UDfs #4
- UDfs #5

WorkPlans Screen

WorkPlans are a valuable tool in SmartAdvocate for ensuring that your firm's work processes are consistent, well-defined, and repeatable. WorkPlans are collections of tasks and other necessary events, organized in a hierarchical tree structure, so that you can nest items (i.e., you can trigger certain items to become active only after another specific item is completed). You can set the due dates of individual tasks relative to other dates in the WorkPlan, or to relevant case dates; alternatively, you can prompt the user to determine the due date when the task becomes active. Tasks activated by a WorkPlan appear in the case summary screen along with other tasks and can be marked completed either in the case summary screen or the WorkPlan screen. You can also set WorkPlan items to trigger certain actions, like changing the case status or generating documents. In this way, you can direct the entire workflow of a case by using a well-designed WorkPlan (according to the needs and practices of your particular firm).

The WorkPlan Management page allows you to view, edit, and record the descriptive details of WorkPlans in the SmartAdvocate system. This is also the only page where new WorkPlans can be created.

The Structure of This Page

| New WorkPlan A | | WorkPlan Administration | | | Export | |
|---|--|-------------------------|---------------|-------------|---------|--|
| Name | Description | Special Notes | Creation Date | Modify Date | Actions | |
| *Sample Work Plan | | | 4/27/2017 | | | |
| 50 H Municipal Hearing Plan | 50 H Municipal Hearing Plan | | 1/1/2014 | 1/25/2014 | | |
| 50H hearing - PW | | B | 5/28/2014 | 10/19/2016 | | |
| 50h Municipal Hearing Plan | 50h Municipal Hearing Plan | | 1/25/2014 | 1/20/2017 | | |
| JAestJoe | test workplan | | 5/7/2015 | 10/19/2016 | | |
| Answer Received Plan - Auto Accident | Answer Received Plan - Auto Accident | | 1/25/2014 | 1/25/2014 | | |
| Answer Received Plan - General Negligence | Answer Received Plan - General Negligence | | 1/25/2014 | 1/25/2014 | | |
| Answer Received Plan - Intentional Tort | Answer Received Plan - Intentional Tort | | 1/25/2014 | 1/25/2014 | | |
| Answer Received Plan - Medical Malpractice | Answer received Plan - Medical Malpractice | | 1/25/2014 | 1/25/2014 | | |
| Arbitration Plan | Arbitration Plan | | 1/25/2014 | | | |
| Arbitration Plan - No Fault | Arbitration Plan - No Fault | | 1/26/2014 | 1/26/2014 | | |
| Arbitration Plan - SUM | Arbitration Plan - SUM | | 1/26/2014 | 1/26/2014 | | |
| Arbitration Plan - UM/UM | Arbitration Plan - UM/UM | | 1/26/2014 | 1/26/2014 | | |
| Auto Accident - New Case Opening Plan | Auto Accident - New Case Opening Plan | null | 1/25/2014 | 1/25/2014 | | |
| Auto Accident - New Case | New Case Opening/Pre-Litigation | | | | | |

1. New WorkPlan button. Used to add a new WorkPlan to the case file. See [Adding a WorkPlan](#).
2. WorkPlan Administration table. Contains the details of WorkPlans and allows various actions to be performed on them. See [WorkPlan Administration Table](#).

WorkPlan Administration Table

The WorkPlan Administration table is where the descriptive details of WorkPlans are stored. Each row of the table represents an individual WorkPlan. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The WorkPlan Administration table contains the following columns:

| Name A | Description B | Special Notes C | Creation Date D | Modify Date E | Actions F |
|---|--|--|--|--|--|
| *Sample Work Plan | | | 4/27/2017 | | |
| 50 H Municipal Hearing Plan | 50 H Municipal Hearing Plan | | 1/1/2014 | 1/25/2014 | |
| 50H hearing - PW | | | 5/28/2014 | 10/19/2016 | |
| 50h Municipal Hearing Plan | 50h Municipal Hearing Plan | | 1/25/2014 | 1/20/2017 | |
| AAestJoe | test workplan | | 5/7/2015 | 10/19/2016 | |
| Answer Received Plan - Auto Accident | Answer Received Plan - Auto Accident | | 1/25/2014 | 1/25/2014 | |

1. Name. The name of the WorkPlan, pulled from the Add/Edit WorkPlan Panel.
2. Description. The description of the WorkPlan, pulled from the Add/Edit WorkPlan Panel.
3. Special Notes. Any special notes about the WorkPlan, pulled from the Add/Edit WorkPlan Panel.
4. Creation Date. The date on which the WorkPlan was created.
5. Modify Date. The date on which the WorkPlan was last modified.
6. Action. Icons to Edit, Open, Copy, or Delete a WorkPlan.

Editing WorkPlan Details

To edit the details (Name, Description and Special Notes only) of a WorkPlan:

Click the [Edit icon](#) in the Actions column of the row representing the WorkPlan you wish to edit. This will bring up an Add/Edit panel for WorkPlans, with the existing information filled in.

Fill the fields in with your desired information. See [The Add/Edit WorkPlan Panel](#) for details about the fields.

Click Save to save the changes and close the panel.

If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Editing the Contents of the WorkPlan

To edit the contents of a WorkPlan, click the WorkPlan icon () in the Actions column of the row representing the WorkPlan the contents you wish to edit. This will bring up the [WorkPlan Editing](#) page for that WorkPlan; see that chapter for instructions on using the WorkPlan Editing interface to edit the WorkPlan.



Copying a WorkPlan

You may wish to create a new WorkPlan based on an existing one. To copy a WorkPlan:

1. Click the [Copy icon](#) () in the Actions column of the row representing the WorkPlan you wish to copy. This will bring up a panel with only one field, for the name of the new WorkPlan.
2. Fill in the desired name, then click OK to copy the WorkPlan. The new WorkPlan will have the same items and structure as the WorkPlan that was copied. You can then make any desired changes to the new WorkPlan.

- If you decide you do not wish to copy the WorkPlan, click Cancel instead of clicking OK to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.



Deleting a WorkPlan

To delete a WorkPlan:

- Click the [Delete icon](#) in the Actions column of the row representing the WorkPlan you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
 - Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the WorkPlan, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a WorkPlan

To add a new WorkPlan:

- Click the New WorkPlan button. This will bring up an Add/Edit panel for WorkPlans, completely blank.
- Fill the fields in with your desired information. See [The Add/Edit WorkPlan Panel](#) for details about the fields.
- Click Update to save the WorkPlan and close the panel. To edit the contents of the new WorkPlan, click the WorkPlan icon () in the Actions column of the row representing the new WorkPlan.



- If you decide you do not wish to save the WorkPlan, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit WorkPlan Panel

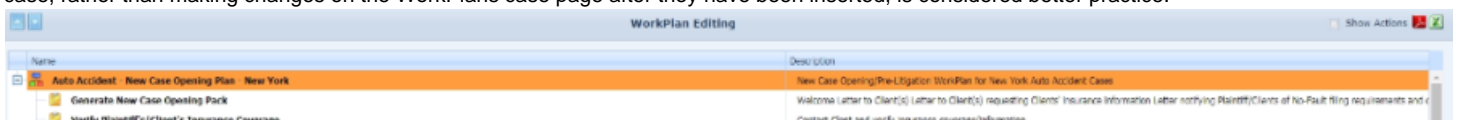
The Add/Edit WorkPlan Panel allows you to fill in the descriptive details of a WorkPlan. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

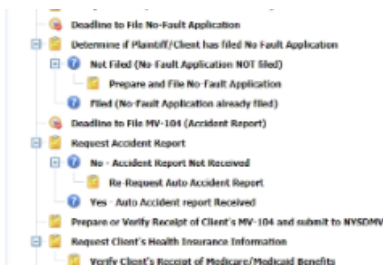
- Name: The name of the WorkPlan.
- Description: The description of the WorkPlan. The description will not appear in the WorkPlan once it is inserted in a case; however, it will be visible in the dropdown when selecting a WorkPlan to manually insert in a case on the WorkPlans case page.
- Special Notes: Any special notes about the WorkPlan.

WorkPlan Editing

The WorkPlan Editing page allows you to manage the contents of a WorkPlan so that it can be inserted into your cases. Before creating a WorkPlan, it is *recommended that you take time, outside of the SmartAdvocate system, to map out the set of tasks and other events that you want to consistently enforce with a WorkPlan*. You should particularly consider how deadlines should be set for each item, and whether there are any sequences of events in which a later item should not be completed or considered until the prior item is first completed. Once you have planned out the intended structure of the WorkPlan, use the WorkPlan Editing page to implement that structure.

The WorkPlan Editing page and the WorkPlans case page have very similar structures and interfaces; however, because the WorkPlan Editing page is for creating the WorkPlan prior to inserting it into a particular case, there is no way to mark an item complete, no distinction between inactive and active items, and no unintended effects when items are added, moved, edited, or deleted. In general, editing WorkPlans on this page prior to inserting them in a case, rather than making changes on the WorkPlans case page after they have been inserted, is considered better practice.





WorkPlan Structure

WorkPlan items are the building blocks of WorkPlans. They represent tasks that must be completed, appointments that must be scheduled, critical deadlines, or decision branches that allow you to determine which of multiple possible sections of a WorkPlan should be implemented given the particular situation of the case. In general, the best way of creating and managing items is through the [Item Templates](#) administrative page. Items created on that page can be quickly and easily added to WorkPlans on this page. However, it is also possible to edit an item directly on this page; once you have edited an item on this page, you can even save it as an item template if you wish.

Items that have been added to WorkPlans are arranged in a hierarchical system, like an organization chart or a computer file structure. Every item has at least one parent item, except for the top-level item, representing the WorkPlan itself and indicated by a WorkPlan icon (). Items with at least one child have a small plus/minus icon next to them; clicking this icon will switch between displaying the item's children and hiding them. When the WorkPlan is inserted in the case, the child items will remain inactive until the parent item has been completed. This means that the task will not be assigned, the appointment will not be scheduled, or the critical deadline will not be set, until the parent item is complete. (Decision items are a partial exception to this rule; see [Decisions](#).) For this reason, the organization of the items in a WorkPlan is essential to properly managing the process the plan represents. It would be possible to put every item in a WorkPlan on the same level, with only the top-level item as a parent, but this would simply cause every item to activate as soon as the WorkPlan was inserted, which would likely be overwhelming to your staff and would eliminate the value of structuring your work process in advance.



Moving Items Within the WorkPlan

To change an item's position in the WorkPlan hierarchy, click on the item and, holding the left mouse button, drag the item over to the desired parent item and release the mouse. The item should become one of the children of the desired parent item. Any children of the item will remain the children of that item, putting them two levels below the new parent item. (You cannot move the top-level item, and you cannot directly switch a parent item with one of its children.)

To move an item up or down in the WorkPlan while still remaining at the same level with the same parent, click either the up or down arrow button to the upper left of the WorkPlan. The ordering of sibling items within a level is purely aesthetic; there is no practical effect to moving the item up or down, so it is entirely a matter of what looks best to you.

Adding Items to a WorkPlan

To add an item to a WorkPlan, right-click the item you wish to make the parent of the new item. Among the items in the right-click menu are Add Task, Add Appointment, Add Critical Deadline, and Add Decision. If you have already created a template for the item you want to add, click whichever of these items matches the item you want to add, which will bring up a panel containing a table of templates; deselect the Open element [...] checkbox by clicking it, then find the template you want to use, and click the check-mark icon in that row. The desired item will be added at the location in the plan you selected. If you have not already created the item template, click any of the four options and then click the Add Empty Item button in the lower right of the panel that appears. A blank item will be added at the location you selected, which will be named "New Element (Please rename)". Right click on the new element and click on Edit. A panel for editing the item will open. See [The Add/Edit WorkPlan Item Template Panel](#) for a description of the panel and how to design the new item. When you are finished, you may click the OK button to save the changes to the item, or you may click the OK & Save as Template button to save the changes to the item and also save the item itself as a new item template. You may instead click the Cancel button or the white X at the upper right of the panel to cancel any changes; however, the blank item will still be present in the WorkPlan and will need to be deleted. Note that no warning will appear before the item is deleted and once an item is deleted, it is permanently removed and will need to be recreated if necessary.

Editing an Item in a WorkPlan

To edit an item once it has been added to a WorkPlan, right-click the item, then click Edit. This will bring up a panel for editing the item. See [The Add/Edit WorkPlan Item Template Panel](#) for a description of the panel and how to edit the item. When you are finished, you may click the OK button to save the changes to the item, or you may click the OK & Save as Template button to save the changes to the item and also save the item itself as a new item template. You may instead click the Cancel button or the white X at the upper right of the panel to cancel any changes.

You can add an action to a WorkPlan item that will be automatically initiated or performed by the SmartAdvocate system either when the item becomes active or is completed. This can be done in the normal course of editing the item, but there is also a shortcut that will bring you directly to the Add/Edit panel for a new WorkPlan item action. To use the shortcut, right-click the item you wish to add the action to, then click the Add New Action option. You can then fill out the panel that appears as usual. Note that after adding the new action, you will be returned to [The Add/Edit WorkPlan Item Template Panel](#), and will have to click OK to fully save the new action in the item.

Deleting an Item from a WorkPlan

To delete an item from a WorkPlan, right-click the item you wish to delete, then click either Delete with sub-items or Remove Item. If you click Delete with sub-items, all of the children of the item you chose to delete will also be deleted. If you click Remove Item, all of the children of the item you chose to delete will move up one level (which means they will be children of the deleted item's parent).

Adding an Entire WorkPlan to Another WorkPlan

You can insert the entire contents of some other existing WorkPlan into the WorkPlan, at the location of a selected item. The selected item will take the place of the top-level item of the inserted WorkPlan; all the children of the inserted WorkPlan's top-level item will become the children of the selected item. To do so, right-click the item where you wish to insert the WorkPlan, then select Insert WorkPlan. A small panel will appear with a [Dropdown](#) allowing you to select the WorkPlan you want to insert. You can, in fact, insert the same WorkPlan you are currently editing, but this may yield inconsistent results and is generally not recommended.

WorkPlan Visibility Options

To see the actions that are attached to each item in a WorkPlan, select the Show Actions checkbox to the upper right of the WorkPlan. Deselect the checkbox to make the actions invisible again. The actions will be visible in green, positioned as though they were children of the item that contains them. However, actions cannot be manipulated like items in this interface. The only option you will have for affecting an action when you right-click it is Delete, which will delete it from the item containing it. Any other changes you wish to make to an action can only be made by editing the item that contains it and clicking the WorkPlan Item Actions tab.

You can simultaneously hide all children of all items by right-clicking any item and clicking Collapse All. You can simultaneously display all children of all items by right-clicking any item and clicking Expand All.

Decisions

Decisions behave slightly differently from any other item in a WorkPlan. A decision contains various decision options, and a decision is completed by marking any one of the decision options as complete. This is used to create a branching structure for your WorkPlan, where different sets of items could be invoked depending on some circumstance of the case. For example, you might have a decision for whether any plaintiff in the case died in the case incident. If not, no additional items are activated, but if so, some sequence of items relating to Surrogate's Court becomes active. Decision groups can be as complicated or simple as you wish.

A decision in a WorkPlan has two parts. One is the decision question, which is an item like a task or appointment. The decision question can be edited like any appointment. However, you cannot add any other item directly to the decision question. If you right-click the decision question, the only thing you can add to it is a decision option, which is one of the possible answers to the decision question. You may add as many decision options as you wish, and as few as two (you could actually have fewer, but then the decision would be useless). Editing a decision option only offers one field: the text of the option. But you can add items to a decision option just as with any non-decision item.

When a decision becomes active in a case, so do all of the options of that decision. (This is the only exception to the general rule that children of incomplete items are not active.) The decision question appears in the [Case Summary](#) page as a task and trying to mark it completed will automatically bring you to the WorkPlans page for that case; it will not yet mark the decision completed. To mark the decision completed, you must mark one of the options of that decision completed from the WorkPlans page. Doing so will also mark the decision question completed and activate all of the children of the option that was marked completed. However, it will not activate any of the children of any of the other options; if that option is not relevant to the case, none of the subsequent items should need to be completed, so they should properly remain inactive for the entire duration of the case. (You may mark more than one option of the same decision completed, if multiple options all apply. This will activate the children of the completed options, and not the children of the options that have not been marked completed, as expected.)

Item Templates

The Item Templates page allows you to create WorkPlan item templates. WorkPlan items are the essential building blocks of WorkPlans; they are the individual requirements that must be completed to move to subsequent WorkPlan items. Item templates allow you to define the specific details of items that can be included easily in any WorkPlan. For commonly used tasks, deadlines, and appointments, defining them as templates can save significant time.

The Structure of This Page

| Name | Type | Category | Priority | Description | Actions |
|---|-------------|------------------|----------|-------------|---------|
| 50(h) Hearing | Appointment | 50H Hearing | Normal | | |
| 50(h) Physical | Appointment | IME | Normal | | |
| Appeal Argument/Submission | Appointment | Appeal | Normal | | |
| Appeal Brief Deadline | Appointment | Appeal | Normal | | |
| Appointment | Appointment | Appointment | Normal | | |
| Arbitration | Appointment | Arbitration | Normal | | |
| Arbitration - No Fault | Appointment | Arbitration | Normal | | |
| Arbitration - UM/UIIM | Appointment | Arbitration | Normal | | |
| CAMP Conference | Appointment | Court Appearance | Normal | | |
| Case Evaluation - For Settlement Conference | Appointment | Court Appearance | Normal | | |
| Case Inventory Review | Appointment | Review | Normal | | |
| Certification Conference | Appointment | Court Appearance | Normal | | |
| Citation Return Date | Appointment | Court Appearance | Normal | | |
| Client Statement | Appointment | Deposition | Normal | | |
| Compliance Conference | Appointment | Court Appearance | Normal | | |
| Conference Call | Appointment | Phone Call | Normal | | |

1. New WorkPlan Item Template button: Used to add a new item template to the SmartAdvocate system. See [Adding an Item Template](#).
2. WorkPlan Item Template Administration table: Contains the item template details and allows various actions to be performed on them. See [WorkPlan Item Template Administration Table](#).













WorkPlan Item Template Administration Table

The WorkPlan Item Template Administration table is where the details of item templates are stored. Each row of the table represents an individual template. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The WorkPlan Item Template Administration table contains the following columns:

| Name | Type | Category | Priority | Description | Actions |
|------|------|----------|----------|-------------|---------|
|------|------|----------|----------|-------------|---------|

| A | B | C | D | E | F |
|----------------------------|-------------|-------------|--------|---|---|
| 50(h) Hearing | Appointment | | Normal | |   |
| 50(h) Physical | Appointment | IHE | Normal | |   |
| Appeal Argument/Submission | Appointment | Appeal | Normal | |   |
| Appeal Brief Deadline | Appointment | Appeal | Normal | |   |
| Appointment | Appointment | Appointment | Normal | |   |
| Arbitration | Appointment | Arbitration | Normal | |   |

1. Name: The name of the item, pulled from the Add/Edit WorkPlan Item Template Panel.
2. Type: The type of event represented and created by the item, pulled from the Add/Edit WorkPlan Item Template Panel.
3. Category: The type of the item, within the event type (e.g.: the appointment type or the critical deadline type), pulled from the Add/Edit WorkPlan Item Template Panel.
4. Priority: The priority level of the item, pulled from the Add/Edit WorkPlan Item Template Panel.
5. Description: The description of the item, pulled from the Add/Edit WorkPlan Item Template Panel.
6. Action: Edit and Delete icons.

Editing an Item Template

To edit an item template:

1. Click the [Edit icon](#) in the Action column of the row representing the template you wish to edit. This will bring up an Add/Edit panel for item templates, with the existing information filled in.
 2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Item Template Panel](#) for details about the fields.
 3. Click Update to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Item Template

To delete an item template:

1. Click the [Delete icon](#) in the Action column of the row representing the template you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
 2. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the template, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Item Template

To add a new item template:

1. Click the New WorkPlan Item Template button. This will bring up an Add/Edit panel for item templates, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit WorkPlan Item Template Panel](#) for details about the fields.
 3. Click Update to save the template and close the panel.
- If you decide you do not wish to save the template, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit WorkPlan Item Template Panel

The Add/Edit WorkPlan Item Template Panel allows you to fill in the details of an item template. The information in this panel is divided into four tabs: **General Information**, **Scheduling Settings**, **Contacts information**, and **WorkPlan Item Actions**. The headings of the tabs are always visible at the top of the panel, but only one tab's contents are visible at a time; click the heading of the tab you wish to access to bring up that tab's information. See Add/Edit Panels for general information about panel structure and usage.

The **General Information tab** contains the following fields:

Edit WorkPlan Item Template ✖

General Information

Scheduling Settings

Contacts information

WorkPlan Item Actions

Name:*

Type:*

Category:

Priority:*

Description:

E

Special Instructions:

F

Update

Cancel

1. Name: The name of the item.
2. Type: A Dropdown, listing the type of event represented and created by the item. The available options are Appointment, Critical Deadline, Decision, and Task.
3. Category: A Dropdown, listing the type of the item within the event type (e.g.: the appointment type or critical deadline type). The Dropdown is empty if Type contains Decision; the Category will be recorded as "No category".
4. Priority: A Dropdown, listing the priority level of the item. It cannot be left blank. The available options are Critical, High, Normal, or Low.
5. Description: A description of the item.
6. Special Instructions: Any special instructions for the item.

The **Scheduling Settings** tab contains a number of fields which are used together to determine the due date of the item. Either the date is entered manually by the user on the [WorkPlans](#) case page, or the date is calculated by adding or subtracting various quantities of time from a date that is significant for either the case or the WorkPlan item itself. The tab contains the following fields:

Edit WorkPlan Item Template
✕

General Information

Scheduling Settings

Contacts information

WorkPlan Item Actions

Prompt user to enter the due date for workplan item.

Set the Due Date of the Item Before **B** the WorkPlan Item's parent **C**

date when parent's item Is Completed **D**

By Calendar **F** Days, And then add Calendar **J** Days

additional Calendar **L** work day Before **M** weekend

If due date is a weekend or holiday, move it to the first Calendar **L** work day Before **M** weekend

Update

Cancel

1. Prompt user to enter the due date [...]: Checkbox which, if selected, causes the item to have no due date when first activated; users who visit the WorkPlans page in the case containing the item will be prompted to set the due date manually. If this field is selected, all other fields in the Scheduling Settings tab are ignored.
2. Set the Due Date [...] [Direction]: Dropdown requiring a selection of whether to set the items due date before, equal to, or after the triggering date. One of the choices must be selected.
3. Set the Due Date [...] [Date]: Dropdown requiring a selection of the trigger date to set the items due date relative to. The available options are Item Entered Date, Case Created Date, incident Date (DOI), or WorkPlan Item's Parent. One of the choices must be selected.
4. date when parent's item: Dropdown permitting a selection of the date, relative to the item's parent, to which to set the item's date
5. [By] Days [Number]: The number of days added to or subtracted from the significant date as part of the date calculation. This field does not appear if Set the Due Date is set to "Equal to".
6. [By] Days [Type]: Dropdown requiring a selection of whether the days added or subtracted in [By] days [Number] are simply calendar days or exclude federal or state holidays and weekends in the calculation. The available options are Calendar, Federal, or State. This field does not appear if Set the Due Date is set to "Equal to".
7. [By] Months: The number of months added to or subtracted from the significant date as part of the due date calculation.
8. [By] Years: The number of years added to or subtracted from the significant date as part of the due date calculation.
9. [Additional] Days [Number]: The number of days added to the significant date as part of the due date calculation.
10. [Additional] Days [Type]: Dropdown requiring a selection of whether the days added in [Additional] Days [Number] are simply calendar days or exclude federal or state holidays and weekends in the calculation. The available options are Calendar, Federal, or State.
11. If due date is a weekend [...]: Checkbox to determine whether to shift a due date if it would otherwise fall on a weekend.
12. work day: Dropdown to choose whether the due date should be shifted to avoid only weekends, or also federal or state holidays. The available options are Calendar, Federal, or State.
13. Weekend: Dropdown requiring a choice whether the due date should be shifted backward or forward. The available options are Before and After.

The **Contacts information tab** is used to select the staff member or members responsible for completing the item. The tab contains only a table listing relevant staff members or case roles; use the New Contact button to add staff members or case roles to specify as the contacts who are responsible for the item (or relevant in other ways). The Add/Edit panel that appears when using the New Contact button or editing a row of the table contains the following fields:

1. [...] contact type: Radio button requiring a choice whether the relevant staff member is selected by their role on the case or as a specific person.
2. [Contact]: Dropdown requiring a choice of the role or staff member relevant to the item, depending on which type is chosen under "contact type".
3. Is responsible for the WorkPlan item: Checkbox that, if checked, causes the staff member or role to be listed as responsible for completing the item.
4. Is acting as assigner of WorkPlan item: Checkbox that, if checked, lists the staff member as the requestor of the item (for tasks only).
5. Check to notify on status changes: Checkbox that, if selected, causes the staff member to receive automatic notifications when the status of the item changes.

The **WorkPlan Item Actions tab** is used to create actions that will automatically be initiated or performed by the SmartAdvocate system either when the item becomes active or is completed. The tab contains only a table listing the actions; use the New Action button to add new actions. The Add/Edit panel that appears when using the New Action button or editing a row of the table contains two tabs, General Information and a second tab whose title and content depends on the selected action type (until an action type is selected, the second tab is not visible at all).

The **General Information tab** contains the following fields:

1. Name: The name of the action. The contents of this field are automatically entered based upon the Action Type chosen but can be edited. Because the name will change if the Action Type or other fields change, it is recommended that this field be edited last.
2. Action Type: Dropdown requiring that the type of action be chosen. The options are Generate Document, Generate Email, Generate Note, Case Action, Insert WorkPlan, or Send Text Message.
3. Priority: Dropdown requiring that the priority level of the action be chosen. The options are Critical, High, Normal, or Low.
4. Action is performed: Radio button, to choose whether the action is entirely performed by the SmartAdvocate system or only initiated by the system, requiring manual input to complete. The options are Automatic or Manually. This field cannot be edited if Generate Document, Case Action, or Insert WorkPlan is selected.
5. Action is executed: Radio button, to choose whether the action is performed/initiated when the item becomes active (i.e.: when its parent item is completed) or when the item is completed. The options are When WorkPlan items becomes active, or When WorkPlan item is completed. This field cannot be edited if Generate Document is selected.
6. Completes the WorkPlan Item?: Checkbox which, if selected, the completion of the action also causes the item to be marked as completed.
7. Description: The description of the action.

If Generate Document is selected in Action Type, the second tab is Generate Document Options, which contains the following fields:

The screenshot shows a dialog box titled "Edit WorkPlan Item Action" with a close button in the top right corner. It has two tabs: "General Information" and "Generate Document Options". The "Generate Document Options" tab is active. Inside the dialog, there is a section with the text "Please choose the document template :" followed by a dropdown menu containing the letter "A". Below this is another section with the text "Please add comments to the document generation :" followed by a large text area containing the letter "B". At the bottom right of the dialog, there are two buttons: "Update" and "Cancel".

1. Please choose the document template: Dropdown allowing the choice of which document template will be used to generate a document when the action is triggered.
2. Please add comments to the document generation: Any comments that should be included when the document is generated.

If Generate Email is selected in Action Type, the second tab is Generate Email Options, which contains the following fields:

The screenshot shows a dialog box titled "Edit WorkPlan Item Action" with a close button in the top right corner. It has two tabs: "General Information" and "Generate Email Options". The "Generate Email Options" tab is active. At the top, there is a red warning message: "Merge codes in templates do not work in 'Automatic' emails!". Below this, there are several fields: "Template:" with a dropdown menu containing "B" and a "Customize" checkbox with a red "C" next to it; "Subject:" with a text box containing "Please enter email subject." and a red "D" above it; "From ..." with a text box containing "Please enter email address." and a red "E" above it; and "To ..." with a text box containing "Selected email address(es)." and a red "F" above it. Below these fields is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, link, unlink, list, and link. The text area of the editor contains the letters "G" and "I". At the bottom of the dialog, there are three tabs: "Design", "HTML", and "Preview". At the bottom right, there are two buttons: "Update" and "Cancel".

1. A warning is provided to caution the user that merge codes in templates will not work in these "Automatic" emails.
2. Template: Dropdown permitting you to choose which email template will be generated and sent when the action is triggered.
3. Customize: Checkbox is used to determine if the content of the email template should be edited.
4. Subject: The "Subject" of the email. If there is a selection in Template, and Customize is not selected, this field cannot be edited.
5. From: The sender of the email in the From field. Clicking the From button next to this field will bring up a panel allowing you to automatically set yourself, any staff member, any role in the case, or the user at the time the email is generated as the sender of the email.
6. To: The recipients of the email in the To field. Clicking the To button next to this field will bring up a panel allowing you to automatically add yourself, any staff member, any role in the case, any contact in the SmartAdvocate system, the user at the time the email is generated, the primary plaintiff, or the primary defendant to the list of recipients of the email.
7. [Body]: The body of the email. If there is a selection in Template and Customize is not selected, this field cannot be edited.

If Generate Note is selected in Action Type, the second tab is Generate Note Options, which contains the following fields:

The screenshot shows the 'Edit WorkPlan Item Action' dialog box with the 'Generate Note Options' tab selected. The 'Template' dropdown is set to 'A', and the 'Type' dropdown is set to 'B'. A 'Customize' checkbox is present to the right of the Template dropdown. Below these are two dropdown menus for font style (set to 'Normal') and font face (set to 'Arial'), followed by a '(Font Size)' dropdown. A rich text editor toolbar is visible with icons for Bold (B), Italic (I), Underline (U), Strikethrough (S), Bulleted List, Numbered List, Indent, and Outdent. The main text area contains the letter 'C'. At the bottom of the editor, the 'Design' tab is selected, with 'HTML' and 'Preview' tabs also visible. 'Update' and 'Cancel' buttons are located at the bottom right of the dialog box.

1. Template: Dropdown allowing you to choose the template upon which the note will be based.
2. Type: Dropdown requiring you to choose the note type.
3. Enter the note text.

If Case Action is selected in Action Type, the second tab is Case Options, which contains the following fields:

The screenshot shows the 'Edit WorkPlan Item Action' dialog box with the 'Case Options' tab selected. The 'Change Case Status To' dropdown is visible, showing a list of case status options. The rest of the dialog box content is partially obscured by the crop.

A dialog box with a large, empty rectangular area for text input. At the bottom right, there are two buttons: "Update" and "Cancel".

1. [Effect]: Dropdown permitting you to choose the effect of the action on the case file. The only option is Change Case Status To.
2. [Options]: Dropdown permitting you to choose the status to which the case will change. If additional options are added to [Effect], the contents of this dropdown may vary.

If Insert Workplan is selected in Action Type, the second tab is WorkPlan Options, which contains the following field:

The dialog box is titled "Edit WorkPlan Item Action". It has two tabs: "General Information" and "WorkPlan Options". The "WorkPlan Options" tab is active. Inside the dialog, there is a label "Please select WorkPlan to insert:" followed by a dropdown menu. The dropdown menu currently shows the letter "A". At the bottom right, there are "Update" and "Cancel" buttons.

1. Please select WorkPlan to insert. Dropdown permitting you to choose the WorkPlan whose contents will be automatically inserted, with this item replacing the top-level parent of the WorkPlan, when the action is triggered.

If Send Text Message is selected in Action Type, the second tab is Text Message Options, which contain the following field:

The dialog box is titled "Edit WorkPlan Item Action". It has two tabs: "General Information" and "Text Message Options". The "Text Message Options" tab is active. Inside the dialog, there is a label "Select template or leave empty to use custom message" above a dropdown menu. The dropdown menu is labeled "Use Template" and has "A" selected, with the text "No template selected. Custom message will be used" displayed. Below the dropdown is a text area labeled "Text:" containing the letter "B". At the bottom left of the text area, it says "Characters remaining: 160". At the bottom right, there are "Update" and "Cancel" buttons.

1. Select template or leave empty [...]: Dropdown allowing you to choose the template upon which the text will be based. If no template is chosen you will be required to insert the context of the text manually.
2. Enter the content of the text. This field will only be editable if no text template has been chosen.

Plaintiff

Plaintiff Summary

The Plaintiff Summary page allows you to view and record the details of the plaintiffs in the case. This includes plaintiffs not represented by your firm, and other parties in the case who act on behalf of plaintiffs but are not themselves named as plaintiffs or otherwise parties in the case (such as parents, guardians, etc.). You may also view and record the details of plaintiff-centric SOLs on this page, though those are primarily managed on the [Critical Deadlines](#) case page.

The Structure of This Page

Note: The Add Plaintiff SOL button and Plaintiff Statutes Of Limitation table are both associated with an individual row of the Plaintiff's table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Plaintiff Summary page, and wherein the Plaintiff's table they appear will depend on which row, if any, of the Plaintiff's table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot shows the Plaintiff Summary interface with the following callouts:

- 1: Add Plaintiff button
- 2: Plaintiffs table header
- 3: Add Plaintiff SOL button
- 4: Plaintiff Statutes Of Limitation table header
- 5: Add Other Plaintiff button
- 6: Other Plaintiffs table header
- 7: Add Non-Party Party button
- 8: Non-Party Party table header

1. Add Plaintiff button: Used to add a new plaintiff who is represented by your firm to the case file. See [Adding a Plaintiff](#).
2. Plaintiffs table: Contains the details of the plaintiffs represented by your firm and allows various actions to be performed on them. See [Plaintiffs Table](#).
3. Add Plaintiff SOL button: Used to add a new plaintiff-centric SOLs to the case file. See [Adding a Plaintiff SOL](#).
4. Plaintiff Statutes of Limitation table: Contains the details of plaintiff-centric statutes of limitation for a particular plaintiff and allows various actions to be performed on them. See [Plaintiff Statutes Of Limitation Table](#).
5. Add Other Plaintiff: Used to add a plaintiff not represented by your firm to the case file. See [Adding an Other Plaintiff](#).
6. Other Plaintiffs table: Contains the details of plaintiffs not represented by your firm and allows various actions to be performed on them. See [Other Plaintiffs Table](#).
7. Add Non-Party Contacts: Used to add a new individual connected to the case but not named as a plaintiff or other party to the case file. See [Adding a Non-Party Contacts](#).
8. Non-Party Contacts table: Contains the details of non-party individuals and allows various actions to be performed on them. See [Non-Party Contacts Table](#).

Plaintiffs Table

The Plaintiff's table is where the details of plaintiffs your firm represents are stored. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Plaintiffs table contains the following columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|--|-------------------|----------------|-------------------|-----|-------|---|---|
| Name | Role | Phone Number | Primary | Doc | Group | | |
| Robinson, Terry-Ann L. DOB: 7/18/1982 Age: 35 year(x),8 month(x),11 day(x) | (P)-Victim | | Primary Plaintiff | 1 | 1 | | |
| Robinson, A. Seth DOB: 1/2/1980 Age: 38 year(x),2 month(x),27 day(x) | (P)-Estate Admin. | (914) 555-1212 | Contact | 0 | 2 | | |
| Jane, Hane (D) DOB: 12/1/2014 Age: 1 year,11 month(x),20 day(x) | (P)-Victim | | | 0 | 3 | | |

1. [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, information about plaintiffs' statutes of limitations applicable to that plaintiff). Clicking on the plus sign opens the Plaintiff Statutes of Limitation subtable for that defendant. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
2. Name: The name, date of birth, and age of the plaintiff.
3. Role: The plaintiff's role in the case.
4. Phone Number: The plaintiff's primary phone number.

5. Primary: Whether the plaintiff is the primary plaintiff and/or your firm's primary contact in the case.
6. Doc: The number of documents associated with the plaintiffs and a link to the documents in the [Documents](#) case page.
7. Group: The plaintiff group to which the plaintiff belongs.
8. [column with no title]: [Right-click icon](#); the right-click menu contains Edit, Edit contact card, and Delete.

Editing a Plaintiff

To edit a plaintiff:

1. Click the [right-click icon](#) in the untitled column of the row representing the plaintiff you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for plaintiffs, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Plaintiff Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Plaintiff

To delete a plaintiff:

1. Make sure the plaintiff you wish to delete is not the primary plaintiff; if you attempt to delete the primary plaintiff, the SmartAdvocate system will display an error message instead of deleting the plaintiff. If the plaintiff you wish to delete is the primary plaintiff, you must edit another plaintiff and select that plaintiff as primary to remove the primary designation from the plaintiff you wish to delete.
2. Click the [right-click icon](#) in the untitled column of the row representing the plaintiff you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
4. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the plaintiff, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Plaintiff

To add a new plaintiff:

1. Click the Add Plaintiff button. This will bring up an Add/Edit panel for plaintiffs, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Plaintiff Panel](#) for details about the fields.
3. Click Save to save the plaintiff and close the panel.
 - If you decide you do not wish to save the plaintiff, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Removing a Plaintiff from the Case

You can remove a plaintiff from the case without deleting the plaintiff. This can prevent significant confusion and loss of data, since at the time of removal, there may be substantial information in the case file associated with the plaintiff, all of which will be deleted along with the plaintiff. Summarily deleting this data would potentially destroy important information, while leaving it as-is may give a mistaken impression about the plaintiff's continued involvement in the case. Removing the plaintiff from the case, as opposed to deleting the plaintiff, maintains the data but crosses out information to clearly indicate that the plaintiff is no longer involved. To remove a plaintiff from the case, simply edit the plaintiff and select the Remove From Case checkbox. You cannot remove the primary plaintiff from the case; you must first designate another plaintiff as the primary plaintiff.

The Add/Edit Plaintiff Panel

The Add/Edit Plaintiff Panel allows you to fill in the details of a plaintiff that your firm represents. The panel is different when adding a new plaintiff than it is when editing an existing plaintiff. When adding a new plaintiff, the contents of the [Add New Contact](#) panel are included in the Add Plaintiff Panel, in order to add the plaintiff as a new contact. However, the Contact Type Details section is replaced with the Sub Category and Contact Comments fields from the [Contact Card](#). Any new contact created through this panel is automatically marked Active and assigned the type General. Some other fields are also present only when adding or only when editing, or are in different locations in the panel. See Add/Edit Panels for general information about panel structure and usage.

The Edit Plaintiff panel contains the following fields:

Edit Plaintiff

Plaintiff Name: **1** Role: **2** Order/Grouping: **3**

Primary Plaintiff: **4** Client: **5** **6** Remove From Case: **8** Plaintiff Missing:

Primary Contact: **7**

Comments: **9**

Created at 12/21/2016 4:28:00 PM by Simpson, Claude, Esq.,
Modified at 12/21/2016 4:28:00 PM by Simpson, Claude, Esq.,

1. Plaintiff Name: The name of the plaintiff.
2. Plaintiff Role: The plaintiff's role in the case.
3. Order/Grouping: The plaintiff group to which this plaintiff is assigned.
4. Primary Plaintiff [or Is Primary]: Whether the plaintiff is the primary plaintiff in the case. This field is labeled Primary Plaintiff when editing an existing plaintiff, and Is Primary when adding a new plaintiff. Only one plaintiff may be marked as primary; selecting a new primary plaintiff will remove the primary designation from the current primary plaintiff.
5. Client: Whether this plaintiff is a client of your firm.
6. Remove From Case: Whether the plaintiff has been removed from the case. This field does not appear when adding a new plaintiff. If this field is selected, all text in this row will be crossed out and the plaintiff will not appear in the Plaintiff area of the [Case Summary](#) page.
7. Primary Contact: Whether the plaintiff is your firm's primary contact in the case. At most one plaintiff may be marked as the primary contact; selecting a new primary contact will remove the primary contact designation from the current primary contact.
8. Plaintiff Missing: Whether the plaintiff is missing.
9. Comments: Any comments about the plaintiff

The Add Plaintiff panel contains the following fields:

Plaintiff Information

Plaintiff Role: **1** Primary Plaintiff: **2** Primary Contact: **3** Client: **4** Copy Address: **5** Order/Grouping: **6** Plaintiff Missing: **7**

Contact

Organization: Individual Gender: * Male Female Unknown

Last Name: * First Name: * **8**

Middle Name: Nick Name:

Prefix: Suffix:

Organization:

Address Use Organization Address

Address Type:

Address 1: **9**

Address 2:

ZIP:

City:

County:

State:

Country:

Address Comments:

Contact Miscellaneous Details

Date of Birth:

Date of Death: **10**

SSN:

Language:

e-Mail:

Phones Use Organization Phones

Primary Text

Originating x

Home Primary Phone x

Cell Phone x

Work Phone x

Sub Category & Comments

Sub Category:

Contact Comments: **12**

Comments: **13**

1. Plaintiff Role: The plaintiff's role in the case.
2. Primary Plaintiff: Whether the plaintiff is the primary plaintiff in the case.
3. Primary Contact: Whether the plaintiff is your firm's primary contact in the case. At most one plaintiff may be marked as the primary contact; selecting a new primary contact will remove the primary contact designation from the current primary contact.
4. Client: This checkbox currently has no functionality in SmartAdvocate, but may be utilized in a future release.
5. Copy Address: Whether to copy the address from another plaintiff in the same case.
6. Order/Grouping: The plaintiff group to which the plaintiff belongs.
7. Plaintiff Missing: Whether the plaintiff is missing.
8. The Name, Gender, and Employer section of this contact card.

9. The Address section of this contact card.
10. The Miscellaneous Details section of this contact card.
11. The Phone Number section of this contact card.
12. The Plaintiff Sub Category and Comment section of this contact card.
13. Comments: Any comments about the plaintiff.

Plaintiff Statutes Of Limitation Subtable

The Plaintiff Statutes Of Limitation table contains the details of statutes of limitations that govern actions taken by a particular plaintiff. It contains the same information as the [Plaintiff Statutes of Limitation Table](#) in the [Critical Deadlines](#) case page, but only for a single plaintiff. The Plaintiff Statutes Of Limitation table is a subtable of the [Plaintiffs Table](#), which means that each row of the Plaintiffs table has an individual Plaintiff Statutes Of Limitation subtable associated with it, which is specific to the plaintiff in that row; open a row of the Plaintiffs table using the plus / minus sign icon to reveal the associated Plaintiff Statutes Of Limitation subtable. Each row of the subtable represents an individual statute of limitations. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Plaintiff Statutes Of Limitation table contains the following columns:

| SOL Type | SOL Date | Date Complied | Comments |
|----------|-----------|---------------|----------|
| SOL | 2/18/2017 | | |
| No Fault | 3/22/2015 | | |

1. SOL Type: The SOL type.
2. SOL Date: The deadline of the SOL.
3. Date Complied: The date of compliance with the SOL.
4. Comments: Any comments about the statute of limitations.
5. [column with no title]: [Right-click icon](#); the right-click menu contains Edit and Delete

Editing a Plaintiff SOL

To edit a plaintiff-centric statute of limitations:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for plaintiff-centric statutes of limitations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Plaintiff SOL Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Plaintiff SOL

To delete a plaintiff-centric statute of limitations:

1. Click the [right-click icon](#) in the untitled column of the row representing the SOL you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the SOL, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Plaintiff SOL

To add a new plaintiff-centric statute of limitations:

1. Click the Add Plaintiff SOL button. This will bring up an Add/Edit panel for plaintiff-centric statutes of limitations, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Plaintiff SOL Panel](#) for details about the fields.
3. Click Save to save the SOL and close the panel.
 - If you decide you do not wish to save the SOL, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Plaintiff SOL Panel

The Add/Edit Plaintiff SOL Panel allows you to fill in the details of a plaintiff-centric statute of limitations. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

1. Plaintiff Name: The plaintiff to whom the statute of limitations applies.
2. SOL Type: The SOL type (including its length).
3. From Date [any date]: The date from which the SOL begins to be counted.
4. Pick From Date: Provides various dates from the case that could be the From Date for purposes of calculating the SOL. Clicking on one of the dates inserts that date into the From Date field.
5. SOL Date: The deadline of the SOL.
6. Date Complied: The date of compliance with the SOL.
7. Comments: Any comments about the statute of limitations.

Other Plaintiffs Table

The Other Plaintiffs table is where the details of plaintiffs not represented by your firm are stored. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Other Plaintiffs table contains the following columns:

| Other Plaintiffs | | | | |
|---------------------|----------------|----------------------|------------------|-----------------|
| Plaintiff | Plaintiff Role | Law Firm | Attorney | Action |
| Anderson, Christine | (P)-Bicyclist | Dewey Cheatem & Howe | Cheatem, Vesture | [Edit] [Delete] |

1. Plaintiff: The name of the plaintiff.
2. Plaintiff Role: The plaintiff's role in the case.
3. Law Firm: The law firm representing the plaintiff.
4. Attorney: The attorney representing the plaintiff.
5. Action: [Action](#) icon; the menu contains Edit and Delete.

Editing an Other Plaintiff

To edit a plaintiff not represented by your firm:

1. Click the [Edit icon](#) in the Action column of the row representing the plaintiff you wish to edit. This will bring up an Add/Edit panel for other plaintiffs, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Other Plaintiff Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Other Plaintiff

To delete a plaintiff not represented by your firm:

1. Click the [Delete icon](#) in the Action column of the row representing the plaintiff you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the plaintiff, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Other Plaintiff

To add a new plaintiff not represented by your firm:

1. Click the Add Other Plaintiff button. This will bring up an Add/Edit panel for other plaintiffs, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Other Plaintiff Panel](#) for details about the fields.
3. Click Save to save the plaintiff and close the panel.
 - If you decide you do not wish to save the plaintiff, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Other Plaintiff Panel

The Add/Edit Other Plaintiff Panel allows you to fill in the details of a plaintiff not represented by your firm. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Other Plaintiff Name:* Anderson, Christine 1

Other Plaintiff Role:* (P)-Bicyclist 2

Law Firm: Dewey Cheatem & Howe 3

Attorney: Cheatem, Wesure 4

Created at 3/30/2018 1:39:17 PM by Dreier, Harry.

Save Cancel

1. Other Plaintiff Name: The name of the plaintiff.
2. Other Plaintiff Role: The plaintiff's role in the case.
3. Law Firm: The law firm representing the plaintiff.
4. Attorney The attorney representing the plaintiff.

Non-Party Contacts Table

The Non-Party Contacts table is where the details of individuals in the case who act on behalf of a plaintiff, but are not themselves named in the case, are stored. Each row of the table represents an individual Non-Party Contacts. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Non-Party Contacts table contains the following columns:

| Non-Plaintiff Party | Plaintiff | Comment | Action |
|---------------------|----------------------|---|--------|
| Le Pew, Pepe | Gingelhymer, John A. | Always call Pepe with information about John. | |
| Smuchas, Maria | Robinson, A. Seth | Primary contact for Seth Robinson. | |

1. Non-Party Contacts: The name of the Non-Party Contacts.
2. Plaintiff: The plaintiff on whose behalf the Non-Party Contacts is acting.
3. Comment: Any comments about the Non-Party Contacts.
4. Action: [Action](#) icon; the menu contains Edit and Delete.

Editing a Non-Party Contacts

To edit a Non-Party Contacts:

1. Click the [Edit icon](#) in the Action column of the row representing the party you wish to edit. This will bring up an Add/Edit panel for non-plaintiff parties, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Non-Party Contacts Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Non-Party Contacts

To delete a Non-Party Contacts:

1. Click the [Delete icon](#) in the Action column of the row representing the party you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the party, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

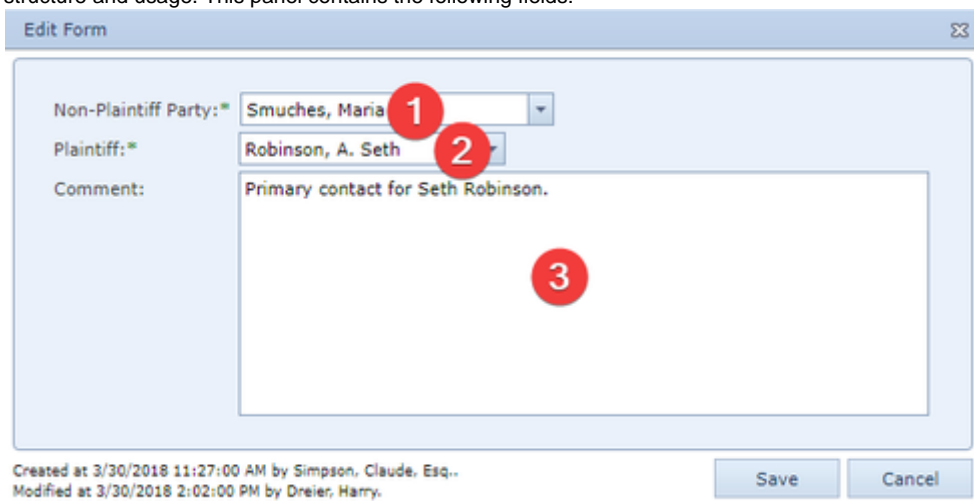
Adding a Non-Party Contacts

To add a new Non-Party Contacts:

1. Click the Add Non-Party Contacts button. This will bring up an Add/Edit panel for non-plaintiff parties, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Non-Party Contacts Panel](#) for details about the fields.
3. Click Save to save the party and close the panel.
 - If you decide you do not wish to save the party, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Non-Party Contacts Panel

The Add/Edit Non-Party Contacts Panel allows you to fill in the details of a Non-Party Contacts. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Non-Party Contacts: The name of the Non-Party Contacts.
2. Plaintiff: The plaintiff on whose behalf the Non-Party Contacts is acting.
3. Comment: Any comments about the Non-Party Contacts.

Counter Claims Table

The Counter Claims table is where the details of Counter Claims that have been filed in the case. Each row of the table represents an CounterClaim. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

| ADD COUNTER CLAIM | | | | | | | | | | | | Counter Claims | | Export | | | |
|-------------------|----------------------|--------------------|----------------------|----------------------|--------------------|------------------------------|---------------|---------|-----------------|------------------|--------|----------------|--|--------|--|--|--|
| CC Plaintiff | Plaintiff Law Firm | Plaintiff Attorney | CC Defendant | Defendant Law Firm | Defendant Attorney | Insu. Co./Adjusting | Adjuster | Claim # | Law Firm File # | Answer to CC due | Action | | | | | | |
| Ripspeed, Mary | Dewey Cheatem & Howe | Cheatem, Wesure D. | Ginglehymer, John A. | Castle & Alamos, LLP | Baker, Amanda | 21 Century Insurance Company | Abate, Nicole | 12345 | ABC895 | 4/25/2023 | | | | | | | |

Columns in the Table

The Counter Claims table contains the following columns:

1. CC Plaintiff: The name of the Counter Claim plaintiff.
2. Plaintiff Law Firm: The law firm that is representing the Counter Claim plaintiff.
3. Plaintiff Attorney: The attorney who is representing the Counter Claim plaintiff.
4. CC Defendant: The name of the Counter Claim defendant.
5. Defendant Law Firm: The law firm that is representing the Counter Claim defendant.
6. Defendant Attorney: The attorney who is representing the Counter Claim defendant.
7. Insurance Co.: The insurance company that covers the Counter Claim defendant.
8. Adjuster: The adjuster for the insurance company that covers the Counter Claim defendant.
9. Claim #: The claim number for the insurance company that covers the Counter Claim defendant.
10. Law Firm File #: The file number for the law firm that is representing the Counter Claim defendant.
11. Answer to CC Due: The date on which the answer is due from the Counter Claim defendant.
12. Action: [Action](#) icon; the menu contains Edit and Delete.

Editing a Counter Claim

To edit a Counter Claim:

1. Click the [Edit icon](#) in the Action column of the row representing the Counter Claim you wish to edit. This will bring up an Add/Edit panel for Counter Claims, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Counter Claims Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Counter Claim

To delete a Counter Claim:

1. Click the [Delete icon](#) in the Action column of the row representing the Counter Claim you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the Counter Claim, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Counter Claim

To add a new Counter Claim:

1. Click the Add Counter Claim button. This will bring up an Add/Edit panel for Counter Claims, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Counter Claims Panel](#) for details about the fields.
3. Click Save to save the party and close the panel.
 - If you decide you do not wish to save the Counter Claim, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Counter Claim Panel

The Add/Edit Counter Claims Panel allows you to fill in the details of a Counter Claim. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Counter Claim ✕

Counter Claim Plaintiff Details

Plaintiff:* 1 Speed, Mary

Law Firm: 2 De Cheatem & Howe - 123 Main Street, FL

Attorney: 3 Cheatem, J. D.

Answer to CC due: 4 2/23 5 Create critical deadline

Counter Claim Defendant Details

Defendant:* 6 Ginter, John A.

Law Firm: 7 Castle & Partners, LLP - 1945 Research Boule

Attorney: 8 Baker, Amanda

Law Firm File #: 9 05

Insurance Co.: 10 21 Century Insurance Company - PO Box 268

Adjuster: 11 Abate, Nicole

Claim #: 12 123

Created at 4/12/2023 11:14:00 AM by Dreier, Harry.

SAVE
CANCEL

1. Plaintiff: The name of the Counter Claim plaintiff.
2. Law Firm: The name of the law firm representing the Counter Claim plaintiff on the Counter Claim.
3. Attorney: The name of the attorney representing the Counter Claim plaintiff on the Counter Claim.
4. Answer to CC Due: The date by which the answer to the Counter Claim is due.
5. Create Critical Deadline: Checkbox that determines whether to create a critical deadline from the date by which the answer to the Counter Claim is due. The box is checked by default once a date is entered in the Answer to CC Due field.
6. Defendant: The name of the Counter Claim defendant.
7. Law Firm: The name of the law firm representing the Counter Claim defendant on the Counter Claim.
8. Attorney: The name of the attorney representing the Counter Claim defendant on the Counter Claim.
9. Law Firm File #: The file number used by the law firm representing the Counter Claim defendant.
10. Insurance Co.: The name of the insurance company covering the Counter Claim defendant on the Counter Claim.
11. Adjuster: The name of the adjuster of the insurance company covering the Counter Claim defendant on the Counter Claim.
12. Claim #: The claim number of the insurance company covering the Counter Claim defendant on the Counter Claim.

Injuries

The Injuries page allows you to view and record the details of plaintiffs' injuries that are relevant to the case.

The Structure of This Page

Note: The Add Injury Details button, Add Injuries Using ICD codes button, and Injury Details table are all associated with an individual row of the Injuries Summary table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Injuries page, and where in the Injuries Summary table they appear, will depend on which row, if any, of the Injuries Summary table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot displays two tables. The top table, 'Injuries', has columns: Plaintiff, Injuries Summary, Pleadings Summary, and Confinements. The bottom table, 'Injury Details', has columns: Injury Date, Injury, Sub BP, Treatments, Sequelae, Medical Provider, Description, Comments, and Actions. Red circles 1-5 point to specific UI elements as described in the list below.

1. Add Injuries Summary button: Used to add a new injury profile to the case file. See [Adding an Injury Profile](#).
2. Injuries Summary table: Contains the general information about plaintiffs' injuries and allows various actions to be performed on that information. See [Injuries Summary Table](#).
3. Add Injury Details button: Used to add a new injury to the case file. See [Adding an Injury](#).
4. Add Injuries Using ICD codes button: Used to quickly add a new injury to the case file, using the ICD code or codes for the injury. See [Adding an Injury](#).
5. Injury Details table: Contains the details of injuries for a particular plaintiff and allows various actions to be performed on them. See [Injury Details Table](#).

Injuries Summary Table

The Injuries Summary table is where injury profiles, which are the overall information about plaintiffs' injuries, are stored. Each row of the table represents the injury profile of an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Injuries Summary table contains the following available columns:

The screenshot shows the 'Injuries' table with columns: Plaintiff, Injuries Summary, Pleadings Summary, Confinements, and Actions. A sixth column with a plus sign is also visible. Red circles 1-6 highlight these columns.

1. [column with no title]: A plus sign **+** in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Injury Details). Clicking on the plus sign opens the Injury Details subtable for that defendant. The plus sign then turns into a negative sign **-** which, when clicked, closes the subtable.
2. Plaintiff: The plaintiff who suffered the injuries.
3. Injuries Summary: The summary of all injuries suffered by the plaintiff relevant to the case.
4. Pleadings Summary: The summary of all pleadings filed in the case on behalf of the plaintiff.
5. Confinements: A description of all confinements (including confinement to the hospital, to bed, and to home; complete incapacitation; and anything else) suffered by the plaintiff.
6. Actions: A Right-click icon; the right-click menu contains Edit, Delete, and Add Details.

An additional column is available for the Injuries Summary table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. The additional column is Created Date, which provides the date on which the Injuries Summary was created.

Editing an Injury Profile

To edit an injury profile:

1. Click the [right-click icon](#) in the Actions column of the row representing the injury profile you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for injury profiles, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Injury Profile Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Injury Profile

To delete an injury profile:

1. Click the [right-click icon](#) in the Actions column of the row representing the injury profile you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the injury profile, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Injury Profile

To add a new injury profile:

1. Click the Add Injuries Summary button. This will bring up an Add/Edit panel for injury profiles, completely blank.
 - If the Add Injuries Summary button is greyed out, injury profiles have already been added for each plaintiff, and no more can be added.
2. Fill the fields in with your desired information. See [The Add/Edit Injury Profile Panel](#) for details about the fields.
3. Click Save to save the injury profile and close the panel.
 - If you decide you do not wish to save the injury profile, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Injury Profile Panel

The Add/Edit Injury Profile Panel allows you to fill in the details of an injury profile. See Add/Edit Panels for general information about panel structure and usage. The information in this panel is divided into two tabs, Summary and Confinements. The headings of the tabs are always visible in the upper left of the panel, but only one tab's contents are visible at a time; click the heading of the tab you wish to access to bring up that tab's information. The panel contains the following fields:

Edit Record ☰

Summary **Confinements**

Plaintiff: Ginglehyme A. 1

Injuries Summary: Amputation, Displaced Fracture Surgery, Adrenal Glands Contusion Tongue Cancer Antibiotic Therapy, Computed Axial Tomography, Ultrasound, Hand Pain, Head, Neck & Back Pain, Knee. Auto-populate 2

Pleadings Summary: Displaced Fracture Surgery, Adrenal Glands Contusion Tongue Cancer Antibiotic Therapy, Computed Axial Tomography, Ultrasound, Hand Pain, Head, Neck & Back Pain, Knee. Auto-populate 3

Created at 11/11/2016 5:12:00 PM by Simpson, Claude, Esq.,
Modified at 10/20/2017 10:22:00 AM by Simpson, Claude, Esq.,

Save Cancel

Edit Record ☰

Summary **Confinements**

Confined to Hospital: 01/20/2015 to 01/28/2015 4

Confined to Bed: 01/28/2015 to 02/06/2015 5

Confined to Home: 01/28/2015 to 02/20/2015 6

Incapacitated: 01/20/2015 to 02/27/2015 7

Comments: 8


Created at 11/11/2016 5:12:00 PM by Simpson, Claude, Esq.,
Modified at 10/20/2017 10:22:00 AM by Simpson, Claude, Esq.,

Save Cancel

1. Plaintiff: The plaintiff who suffered the injuries. When editing an existing injury profile, this field is uneditable.
2. Injuries Summary: The summary of all injuries relevant to the case suffered by the plaintiff. Clicking the Auto-populate button next to the field will add all of the injury details in the Injury Details subtable associated with the plaintiff to the end of this field; the text thereby added contains no punctuation or other automatic formatting, so some editing will likely be necessary
3. Pleadings Summary: The summary of all pleadings in the case filed on behalf of the plaintiff. Clicking the Auto-populate button next to the field will add all of the injury details in the Injury Details subtable associated with the plaintiff to the end of this field; the text thereby added contains no punctuation or other automatic formatting, so some editing will likely be necessary
4. Confined to Hospital: A description of any confinements to a hospital as a result of the injuries.
5. Confined to Bed: A description of any confinements to bed as a result of the injuries.
6. Confined to Home: A description of any confinements to home as a result of the injuries.
7. Incapacitated: A description of any incapacitation as a result of the injuries.
8. Comments: Any other confinements as a result of the injuries or any comments about the injury profile or confinements.

Injury Details Table

The Injury Details table is where the details of individual injuries are stored. The Injury Details table is a subtable of the Injuries Summary table, which means that each row of the Injuries Summary table has an individual Injury Details table associated with it, which is specific to the plaintiff in that row;

open a row of the Injuries Summary table using the open/close icon () to reveal the associated Injury Details table. Each row of the table represents an individual injury. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Injury Details table contains the following available columns:

| Add Injury Details | | Add Injuries Using ICD codes | | Injury Details | | | | | Export |
|--------------------|----------------------------|------------------------------|---|----------------|------------------|-------------|----------|---------|--------|
| Injury Date | Injury | Sub BP | Treatments | Sequelae | Medical Provider | Description | Comments | Actions | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | |
| | Surgery | No | | | | | | | |
| | Adrenal Glands - Contusion | No | Antibiotic Therapy, Computed Axial Tomography, Ultrasound | | | | | | |
| | Donsalga | No | | | | Donsalga | | | |

1. Injury Date: The date the injury occurred.
2. Injury: A brief description of the injury, generally bodily location and type of damage.
3. Sub BP: Whether the injury details must be included in a bill of particulars or response to interrogatories.
4. Treatments: How the injury has been or is being treated.
5. Sequelae: The conditions resulting from the injury.
6. Medical Provider: The medical providers that treated the plaintiff for the injury.
7. Description: A more thorough description of the injury than that in the Injury column.
8. Comments: Any comments about the injury.
9. Actions: A Right-click icon; the right-click menu contains Edit and Delete.

Editing an Injury

To edit an injury:

1. Click the [right-click icon](#) in the Actions column of the row representing the injury you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for injuries, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Injury Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Injury


To delete an injury:

1. Click the [right-click icon](#) in the Actions column of the row representing the injury you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the injury, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.


Adding an Injury

There are two ways to add a new injury: using the Add/Edit Injury Panel, which is the more thorough approach, or using the ICD code entry panel, which allows you to quickly enter as many injuries as you wish using ICD codes, but allows no further details; you must edit the injury once it is created to add any details.

To add an injury using the Add/Edit Injury Panel:

1. If the row representing the injury profile you wish to add the injury to is not open, click the plus sign icon  to open the row. This will reveal the Injury Details subtable for that row.
 - Alternatively, click the [right-click icon](#) in the Action column of the row representing the injury profile you wish to add the injury to, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Details option in the menu. This will bring up an Add/Edit panel for injuries, blank except for defaults. Skip to step 3.
2. Click the Add Injury Details button. This will bring up an Add/Edit panel for injuries, blank except for defaults.
3. Fill the fields in with your desired information. See [The Add/Edit Injury Panel](#) for details about the fields.
4. Click Save to save the injury and close the panel.
 - If you decide you do not wish to save the injury, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

To add an injury using the ICD code entry panel:

1. If the row representing the injury profile you wish to add the injury to is not open, click the plus sign icon  to open the row. This will reveal the Injury Details subtable for that row.
2. Click the Add Injuries Using ICD codes button. This will bring up the ICD code entry panel, which only contains a single [Text input](#) field.
3. Enter the ICD-10 codes for any injuries you wish to add. Do not use periods; if you wish to enter a code that contains a period, simply omit the period (e.g. if you wish to enter the code Y93.64, enter Y9364 instead). To add multiple codes at once, separate them with a comma. Spaces between codes are ignored; you may use them or not as you wish.
4. Click Add to add the injuries represented by the codes and close the panel.

- The injuries will be added as separate rows of the Injury Details table. The Injury column will contain the ICD description of the injury, using abbreviations to shorten the overall length of the description. The Description column will contain the ICD description, unedited. Sub BP will be set to No and Created Date will be set to the current date. No other columns will contain data.
- If you decide you do not wish to add the injuries, click Cancel instead of clicking Add to undo any typing and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Injury Details Panel

The Add/Edit Injury Details Panel allows you to fill in the details of an injury. Injuries can be added as a Specific Injury, Quick Injury, or Other Injury. The panels for adding an injury vary depending on which type of injury is chosen. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Specific Injury:

The 'Edit Record' window for a 'Specific Injury' includes the following fields and callouts:

- 1**: Radio button for 'Specific Injury' (selected).
- 2**: 'Body Part (Add New)' section with 'Left' and 'Right' radio buttons.
- 3**: 'Injury (Add New)' dropdown menu.
- 4**: 'Sequelae (Add New)' list with 'Arthritis' selected.
- 5**: 'Treatments (Add New)' list with 'Anterior Decompression without Fusion' selected.
- 6**: 'Injury / Diagnosis Date' dropdown menu.
- 7**: 'Medical Providers' list with 'A.O. Fox Hospital' selected.
- 8**: 'Additional Injury Description' text area containing 'Client has lost all feeling in his left arm.'
- 9**: 'Sub BP / Interrogatories Required' checkbox (unchecked).
- 10**: 'Comments' text area containing 'Client denies loss of consciousness.'
- 11**: 'Save' button.
- 12**: 'Cancel' button.

Quick Injury:

The 'Edit Record' window for a 'Quick Injury' includes the following fields and callouts:

- 1**: Radio button for 'Quick Injury' (selected).
- 13**: 'Injury' section with radio buttons for various injury types, including 'Ankle', 'Head, Neck & Back Pain', 'Right Knee', 'Back Pain', 'Knee', 'Scarring', 'Concussion', 'Leg Pain', 'Shoulder', 'Hand Pain', 'Muscle Deterioration', 'Surgery', 'Head Pain', 'Neck Pain', and 'Wrist Pain'.
- 8**: 'Injury / Diagnosis Date' dropdown menu.
- 9**: 'Medical Providers' list with '32 Oaks Hospital' selected.
- 10**: 'Additional Injury Description' text area.
- 11**: 'Sub BP / Interrogatories Required' checkbox (unchecked).
- 12**: 'Comments' text area.
- 13**: 'Save' button.
- 14**: 'Cancel' button.

Footer text: Created at 9/13/2017 3:29:00 PM by Emma, Clinia, Res- Hospital at 3/30/2018 3:48:00 PM by Derek, Harry.

Other Injury:

1. [field with no prompt]: Whether the injury should be entered as a selection of specific locations, types, sequelae, and treatments (Specific Injury), should be entered as a Quick Injury, or should be entered manually with optional ICD codes (Other Injury).
2. Left: Whether the injury occurred to the left one of a body part that exists as a pair.
3. Right: Whether the injury occurred to the right one of a body part that exists as a pair.
4. Body Part: Which body part was injured. This field does not appear unless the promptless field is set to Specific Injury. You may click the (Add New) text next to the field title to add a body part to the list.
5. Injury [Specific]: The type of damage involved in the injury. This field does not appear unless the promptless field is set to Specific Injury. You may click the (Add New) text next to the field title to add a body part to the list.
6. Sequelae: The conditions resulting from the injury. This field does not appear unless the promptless field is set to Specific Injury. You may click the (Add New) text next to the field title to add a body part to the list.
7. Treatments: How the injury has been or is being treated. This field does not appear unless the promptless field is set to Specific Injury. You may click the (Add New) text next to the field title to add a body part to the list.
8. Injury / Diagnosis Date: The date the injury occurred (or was diagnosed if the injury was not caused by a single known event).
9. Medical Providers: The medical providers that treated the plaintiff for the injury.
10. Additional Injury Description: A more thorough description of the injury.
11. Sub BP / Interrogatories Required: Whether the injury details must be included in a bill of particulars or response to interrogatories.
12. Comments: Any comments about the injury.
13. Injury [Quick]: The Quick Injury that represents the injury. This field does not appear unless the promptless field is set to Quick Injury.
14. Look up using ICD Diagnosis Codes: Tool for adding injury details using ICD-10 codes. This field does not appear unless the promptless field is set to Other Injury.
15. Injury [Other]: A brief description of the injury. This field does not appear unless the promptless field is set to Other Injury.

The ICD Diagnosis Code Lookup Tool

The ICD Diagnosis Code Lookup Tool is a tool field that provides a shortcut for including ICD descriptions of injuries in the Injury [Other] field in the Add /Edit Injury Panel. To use the tool:

1. Enter the ICD-10 codes for any injuries you wish to add in the field. Do not use periods; if you wish to enter a code that contains a period, simply omit the period (e.g. if you wish to enter the code Y93.64, enter Y9364 instead). To add multiple codes at once, separate them with a comma. Spaces between codes are ignored; you may use them or not as you wish.
2. Click the Add button. The ICD description of the injury will be added at the bottom of both the Injury [Other] and Additional Injury Description fields. In the Injury [Other] field, abbreviations may be used to shorten the overall length of the description. The Additional Injury Description field will contain the ICD description, unedited.

Note that any text left in the lookup tool itself when you save the changes to the panel will be discarded; you must click the Add button to actually add the description corresponding to the code.

Medical Providers

The Medical Providers page allows you to view and record the details of medical providers and medical records that are relevant to the case, and to keep track of individual visits, bills, and medical record requests. You can also generate the documents for medical record requests directly from this page.

The Structure of This Page

Note: The Add Visit button, Medical Visits table, Add New Bill button, Medical Bills table, Add Amount Paid button, and Amount Paid table are all associated with an individual row of the Medical Providers table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Medical Providers page, and where in the Medical Providers table they appear, will depend on which row, if any, of the Medical Providers table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot displays the 'Medical Providers' interface with several subtables. Red circles 1-11 highlight the following elements:

- 1: Add Medical Provider button
- 2: Medical Providers table header
- 3: Add Visit button
- 4: Medical Visits table header
- 5: Add New Bill button
- 6: Medical Bills table header
- 7: Add Amount Paid button
- 8: Amount Paid table header
- 9: Add Medical Request button
- 10: Show Active Requests Only checkbox
- 11: Medical Requests table header

1. Add Medical Provider button: Used to add a new medical provider to the case file. See [Adding a Medical Provider](#).
2. Medical Providers table: Contains the medical provider details and allows various actions to be performed on them. See [Medical Providers Table](#).
3. Add Visit button: Used to add a new medical visit to the case file. See [Adding a Medical Visit](#).
4. Medical Visits table: Contains the medical visit details for a particular medical provider and allows various actions to be performed on them. See [Medical Visits Table](#).
5. Add New Bill button: Used to add a new medical bill to the case file. See [Adding a Medical Bill](#).
6. Medical Bills table: Contains the medical bill details for a particular medical provider and allows various actions to be performed on them. See [Medical Bills Table](#).
7. Add Amount Paid button: Used to add a payment of a medical bill to the case file. See [Adding a Medical Payment](#).
8. Amount Paid table: Contains the payment details of medical bills from a particular medical provider and allows various actions to be performed on them. See [Amount Paid Table](#).
9. Add Medical Request button: Used to add a medical record request to the case file. See [Adding a Medical Record Request](#).
10. Show Active Requests Only checkbox: If selected, requests with a Completed date will not appear in the Medical Requests table. Click the checkbox to change it from selected to deselected or vice versa.
11. Medical Requests table: Contains the details of medical record requests and allows various actions to be performed on them. See [Medical Requests Table](#).

Medical Providers Table

The Medical Providers table is where the details of medical providers are stored. Each row of the table represents an individual medical provider and an individual plaintiff who obtained medical services from that provider. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Medical Providers table may contain the following columns:

The screenshot shows the 'Medical Providers' table with the following columns highlighted by red circles 1-15:

- 1: [column with no title]
- 2: Plaintiff
- 3: Provider
- 4: Specialty
- 5: Don't Pay at Settlement
- 6: Start Date
- 7: End Date
- 8: Ended
- 9: Total Bill
- 10: Docs
- 11: Notes
- 12: Expert
- 13: Lien
- 14: [column with no title]
- 15: Action

1. [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, medical visits, medical bills, and amount paid information for the medical provider applicable for that plaintiff). Clicking on the plus sign opens the Medical Provider subtable for that plaintiff. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
2. Plaintiff: The plaintiff who was treated by the medical provider.
3. Provider: The medical provider who treated the plaintiff.
4. Specialty: The medical specialization of the medical provider.
5. Don't Pay at Settlement: Whether the Don't Pay at Settlement box has been checked for the medical provider.

6. **Start Date:** The date that the medical treatment began. When a medical visit is added for the provider with a start date earlier than the value in this column, this column automatically changes to the new visit's start date.
7. **End Date:** The date that the medical treatment ended. When a medical visit is added for the provider with an end date later than the value in this column, this column automatically changes to the new visit's end date.
8. **Ended:** Whether the medical treatment has ended or not. This column is shared between the medical provider and all associated medical visits; any change to this column in any of those rows changes it in all the rows.
9. **Total Bill:** The sum of all bills related to visits with the medical provider. The sum of this column across all rows in the table appears below the last row of the column.
10. **Docs:** The number of documents associated with the medical provider and a link to the documents in the [Documents](#) case page. The sum of this column across all rows in the table appears below the last row of the column (the sum does not include a link).
11. **Notes:** The number of notes associated with the medical provider and a link to the notes in the [Notes](#) case page. The sum of this column across all rows in the table appears below the last row of the column (the sum does not include a link).
12. **#:** The number of visits to the medical provider. Automatically changes to the number of rows in the Medical Visits subtable for this row when a medical visit is added to or deleted from the table. Clicking this column in any row will open the subtables for that row (it will not close them if they are already open). The sum of this column across all rows in the table appears below the last row of the column (clicking the sum has no effect).
13. **Expert:** Whether the medical provider is also acting as an expert.
14. **Lien:** Whether the medical provider appears on the Lien Tracking page.
15. **Action:** A Right-click icon; the right-click menu contains Edit Provider, Add Bill, Add Request, Add Visit, Delete Provider, Copy total bill to liens, Copy all bills to liens, and Select Documents.

Additional columns available using the Show/Hide Columns button:

1. **Neg. Bills:** The sum of all negotiated bills related to visits with the medical provider. The sum of this column across all rows in the table appears below the last row of the column.
2. **Balance:** The total outstanding balance on bills related to the plaintiff's visits with the medical provider. The sum of this column across all rows in the table appears below the last row of the column.
3. **Canceled Requests:** The number of canceled medical record requests associated with the plaintiff and medical provider.
4. **Comments:** Any comments about the medical provider.
5. **Completed Requests:** The number of completed medical record requests associated with the plaintiff and medical provider.
6. **Don't Pay at Settlement:** Whether the "Don't Pay at Settlement" button has been checked on the Medical Provider panel. When checked, Negotiation/Settlement population and check generation will ignore any Medical bills with the "Don't Pay at Settlement" checkbox flagged.
7. **External Requests:** The number of external medical record requests associated with the plaintiff and medical provider.
8. **Internal Requests:** The number of internal medical record requests associated with the plaintiff and medical provider.
9. **Is Referred:** Whether the plaintiff was referred to the medical provider by your firm.
10. **Other Requests:** The number of other medical record requests associated with the plaintiff and medical provider.
11. **Rejected Requests:** The number of rejected medical record requests associated with the plaintiff and medical provider.
12. **Requests:** The number of each status of medical record requests associated with the plaintiff and medical provider.
13. **Sub-Specialty:** The medical subspecializations of the medical provider.
14. **Total Payments:** The total amount of payments on bills related to the plaintiff's visits with the medical provider. The sum of this column across all rows in the table appears below the last row of the column.
15. **Will Testify:** Whether the medical provider is willing to testify.
16. **Hospital Chart/File #:** The hospital chart/file # utilized by the medical provider.
17. **Account #:** The account number for this medical provider.

Editing a Medical Provider

To edit a medical provider:

1. Click the [right-click icon](#) in the Action column of the row representing the medical provider you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the medical provider you wish to edit. This will bring up an Add/Edit panel for medical providers, with the existing information filled in. Skip to step 3.
2. Click the Edit Provider option in the menu. This will bring up an Add/Edit panel for medical providers, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Medical Provider Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Medical Provider

To delete a medical provider:

1. Make sure there are no medical visits associated with the provider. All medical visits associated with the provider must be deleted before attempting to delete the provider. See [Deleting a Medical Visit](#) to delete any visits currently associated with the provider.
2. Click the [right-click icon](#) in the Action column of the row representing the medical provider you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the medical provider you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
3. Click the Delete Provider option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
4. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the medical provider, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Medical Provider

To add a new medical provider:

1. Click the Add Medical Provider button. This will bring up an Add/Edit panel for medical providers, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Medical Provider Panel](#) for details about the fields.

- Click Update to save the medical provider and close the panel.
 - If you decide you do not wish to save the medical provider, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Medical Provider Panel

The Add/Edit Medical Provider Panel allows you to fill in the details of a medical provider. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Add/Edit Medical Provider' window with the following fields and callouts:

- 1: Plaintiff dropdown menu (Ginglehymer, John A.)
- 2: Provider dropdown menu (Roosevelt Hospital Division - Me Records Dept,1000 Tenth)
- 3: Start Date (01/20/2015)
- 4: End Date (12/10/2018)
- 5: Treatment ended checkbox
- 6: Will Testify dropdown menu
- 7: Hospital Chart/File # (1234567890)
- 8: Expert checkbox
- 9: Total Visits (2)
- 10: Referred Date (/ /)
- 11: Is Referred checkbox
- 12: Medical Records dropdown menu (Undecided)
- 13: Bills Finalized checkbox
- 14: Don't Pay at Settlement checkbox
- 15: Notes text area
- 16: Comments text area (04-20-2018 - more notes, 05-09-2018 - Notes for today, 05-08-2018 - Notes for today)
- 17: Attach button
- 18: Select button
- 19: Related Documents table (None of the Documents were selected)

Metadata at the bottom left: Created at 7/5/2017 2:35:00 PM by Simpson, Claude R., Esq., Modified at 12/10/2018 1:00:00 PM by Dreier, Harry. Buttons for Save and Cancel are at the bottom right.

- Plaintiff: The plaintiff who obtained medical services from the medical provider.
- Provider: The medical provider.
- Start Date: The date that the medical treatment began.
- End Date: The date that the medical treatment ended.
- Treatment ended: Whether the medical treatment has ended.
- Will Testify: Whether the medical provider is willing to testify.
- Hospital Chart/File #: The identification number of any chart or file kept by the medical provider regarding the treatment.
- Expert: Whether the medical provider is also acting as an expert.
- Total Visits: The number of visits made by the plaintiff to the medical provider. Entering anything other than an integer in this field will cause an error.
- Referred Date: The date on which your firm referred the plaintiff to this medical provider (if it did so). Entering a date in this field automatically checks the Is Referred box.
- Is Referred: Whether the plaintiff was referred to the medical provider by your firm. Checking this box enters today's date into the Referred Date field, however the date can be edited.
- Medical Records: Whether you intend to order medical records from this provider, or have already done so.
- Bills Finalized: Whether the medical providers bills have been finalized.
- Don't Pay at Settlement: Whether the Don't Pay at Settlement box has been checked on the Add/Edit Medical Provider panel.
- Notes: ???
- Comments: Any comments about the medical provider.
- Attach [Related Documents]: Button to attach documents to the medical provider from your computer or anywhere on your network to which you have access.
- Select [Related Documents]: Button to select documents already added to the Documents page to the medical provider.
- Related Documents: List of documents that have been added to the medical provider.

The Related Documents Field and Documents Panel

The Related Documents field and Documents panel allow you to select documents and specifically relate them to a particular record on this page. This can help you quickly identify and access the most relevant document when you or another staff member visits this page at a later time. When you click Select Documents from the right-click menu, or click the Select button in the Related Documents field, a table of the documents in the case will appear. When you click Attach Documents from the right-click menu, or click the Attach button in the Related Documents field, you will be able to search your computer or anywhere on your network to which you have access. Find the document or documents you wish to associate with the particular record and select the checkbox for each document. Click Select or Update to confirm the selection. The descriptions of each selected document will appear in the Documents column in the table. Clicking the description of a document will automatically open that document.

Medical Visits Table

The Medical Visits table is where the details of medical visits are stored. The Medical Visits table is a subtable of the [Medical Providers Table](#), which means that each row of the Medical Providers table has an individual Medical Visits table associated with it, which is specific to the medical provider in that row; open a row of the Medical Providers table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Medical Visits table. Each row of the table represents an individual medical visit or series of visits. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Medical Visits table contains the following available columns:

| Start Date | End Date | Visit Type | Complaint | Diagnosis | Treatment Plan | Comments | Action |
|------------|------------|------------------|------------------|---------------|--|---|--------|
| 12/19/2017 | 12/19/2017 | Ambulance | | | | | |
| 2/11/2018 | 2/11/2018 | Physical Therapy | Lower body gain. | Poor posture. | Physical therapy, exercise; heating pad as needed. | Next appointment scheduled for 2/18/18. | |

1. Start Date: The date that the medical visit began.
2. End Date: The date that the medical visit ended.
3. Visit Type: The type of the medical visit.
4. Complaint: The plaintiff's complaint that spurred the medical visit.
5. Diagnosis: The medical provider's diagnosis of the cause of the complaint.
6. Treatment Plan: The medical provider's treatment plan arising out of the visit.
7. Comments: Any comments about the medical visit.
8. Action: A Right-click icon; the right-click menu contains Edit Visit, Add Request, and Delete Visit.

Editing a Medical Visit

To edit a medical visit:

1. Click the [right-click icon](#) in the Action column of the row representing the visit you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the visit you wish to edit. This will bring up an Add/Edit panel for medical visits, with the existing information filled in. Skip to step 3.
2. Click the Edit Visit option in the menu. This will bring up an Add/Edit panel for medical visits, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Medical Visit Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Medical Visit

To delete a medical visit:

1. Click the [right-click icon](#) in the Action column of the row representing the visit you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the visit you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete Visit option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the visit, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Medical Visit

To add a new medical visit:

1. If the row representing the medical provider you wish to add the visit to is not open, click the open/close icons (plus sign to open, minus sign to close) for the row. This will reveal the Medical Visits subtable for that row.
 - Alternatively, click the Add Visit icon in the Actions column of the row representing the medical provider you wish to add the visit to. This will bring up an Add/Edit panel for medical visits, blank except for Start Date and End Date, which will both be set to the current date. Skip to step 3.
 - Another alternative is to click the [right-click icon](#) in the Action column of the row representing the medical provider you wish to add the visit to, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Visit option in the menu. This will bring up an Add/Edit panel for medical visits, blank except for Start Date and End Date, which will both be set to the current date. Skip to step 3.
2. Click the Add Visit button. This will bring up an Add/Edit panel for medical visits, blank except for Start Date and End Date, which will both be set to the current date.
3. Fill the fields in with your desired information. See [The Add/Edit Medical Visit Panel](#) for details about the fields.
4. Click Update to save the visit and close the panel.
 - If you decide you do not wish to save the visit, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Medical Visit Panel

The Add/Edit Medical Visit Panel allows you to fill in the details of a medical visit. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Add/Edit Visit

Start Date: 02/18/18 (1) End Date: 02/18/18 (2)

Visit Type: Physical Therapy (3) Visit Result: (4)

Complaint: Lower body pain. (5)

Diagnosis: Poor posture. (6)

Treatment Plan: Physical therapy, exercise; heating pad as needed. (7)

Comments: Next appointment scheduled for 2/18/18. (8)

Created at 2/11/2018 12:27:00 PM by Simpson, Claude, Esq., Save Save & Add Task Cancel

1. Start Date: The date that the medical visit began.
2. End Date: The date that the medical visit ended.
3. Visit Type: The type of the medical visit.
4. Visit Result: The outcome of the visit.
5. Complaint: The plaintiff's complaint that spurred the medical visit.
6. Diagnosis: The medical provider's diagnosis of the cause of the complaint.
7. Treatment Plan: The medical provider's treatment plan arising out of the visit.
8. Comments: Any comments about the medical visit.

Medical Bills Table

The Medical Bills table is where the details of medical bills are stored. The Medical Bills table is a subtable of the [Medical Providers Table](#), which means that each row of the Medical Providers table has an individual Medical Bills table associated with it, which is specific to the medical provider in that row; open a row of the Medical Providers table using the open/close icon to reveal the associated Medical Bills table. Each row of the table represents an individual bill. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Medical Bills table contains the following available columns:

| Visit/Comments (1) | Bill # (2) | Account # (3) | Bill Amount (4) | Negotiated Bill Amount (5) | Submit Date (6) | Date From (7) | Date To (8) | Balance Amount (9) | Action (10) |
|-------------------------------------|------------|---------------|-----------------|----------------------------|-----------------|---------------|-------------|--------------------|-------------|
| Visit at 12/19/2017 Ambulance | | 65665463543 | \$800.00 | | | 12/4/2017 | 12/14/2017 | (\$1,000.00) | |
| Visit at 12/19/2017 Ambulance | | | \$510.00 | | | | | \$510.00 | |
| Visit at 2/11/2018 Physical Therapy | | | \$1,240.00 | | | | | \$1,240.00 | |

Page 1 of 1 (3 items) Show/Hide Columns

1. Visit/Comments: The details of the medical visit the bill is associated with (the date of the visit and the visit type) and any comments about the bill.
2. Bill #: The identification number of the bill.
3. Account #: The identification number of the account the bill is part of.
4. Bill Amount: The initial amount of the bill.
5. Negotiated Bill Amount: The amount of the bill after negotiation and/or other discounting.
6. Submit date: The date the bill was issued by the medical provider or billing service.
7. Date From: The start date of the period of the medical visit included in the bill.
8. Date To: The end date of the period of the medical visit included in the bill.
9. Balance Amount: The outstanding balance on the bill. This field is automatically calculated: if the Negotiated Bill Amount field is not blank, then this column equals the amount in the Negotiated Bill Amount field minus the sum of the Paid Amount column for all rows in the Amount Paid table associated with the bill; otherwise, this column equals the amount in the Bill Amount field minus the sum of the Paid Amount column for all rows in the Amount Paid table associated with the bill.
10. Action: A [right-click icon](#); the right-click menu contains Edit Bill, Delete Bill, and Copy Bill to Liens.

Editing a Medical Bill

To edit a medical bill:

1. Click the [right-click icon](#) in the Action column of the row representing the bill you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the bill you wish to edit. This will bring up an Add/Edit panel for medical bills, with the existing information filled in. Skip to step 3.
2. Click the Edit Bill option in the menu. This will bring up an Add/Edit panel for medical bills, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Medical Bill Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.

- If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Medical Bill

To delete a medical bill:

1. Click the [right-click icon](#) in the Action column of the row representing the bill you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the bill you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete Bill option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the bill, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Medical Bill

To add a new medical bill:

1. If the row representing the medical provider you wish to add the bill to is not open click the open/close icons (plus sign to open, minus sign to close) for the row. This will reveal the Medical Bills subtable for that row.
 - Alternatively, click the Add Bill icon in the Actions column of the row representing the medical provider you wish to add the bill to. This will bring up an Add/Edit panel for medical bills, completely blank. Skip to step 3.
 - Another alternative is to click the [right-click icon](#) in the Action column of the row representing the medical provider you wish to add the bill to, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Bill option in the menu. This will bring up an Add/Edit panel for medical visits, completely blank. Skip to step 3.
2. Click the Add New Bill button. This will bring up an Add/Edit panel for medical bills, completely blank.
3. Fill the fields in with your desired information. See [The Add/Edit Medical Bill Panel](#) for details about the fields.
4. Click Update to save the bill and close the panel.
 - If you decide you do not wish to save the bill, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying Bills to Liens

You can copy the amounts of medical bills directly to the [Lien Tracking](#) page. Doing so will add the medical provider associated with the bill to the Lien Tracking page as a lienor of type Hospital if the provider is not already listed as a lienor, and will add a lien entry or multiple entries to the Lien History subtable for that lienor, of lien type Hospital and with the bill amount listed as the Unconfirmed Amount. Doing so can be substantially easier than manually entering each bill into the Lien Tracking page, especially when there are a large number of bills from a single provider. There are three different ways to copy medical bills to liens, each of which transfers the bill amounts in a slightly different way from the others.

One option is to transfer the total amount of all bills from a particular provider for a particular plaintiff to the Lien Tracking page as a single lien reflecting the entire amount. The amount will be equal to the Total Bill column in the corresponding row of the Medical Providers table; it will not take into account any negotiation of the bills. To do so:

1. Click the [right-click icon](#) in the Action column of the row of the Medical Providers table representing the medical provider whose bills you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy total bill to liens option in the menu. This will bring up a confirmation message.
3. Click the OK button in the message to confirm the copying.
 - If you decide you do not wish to copy the bill, click Cancel instead of clicking OK to cancel the copying. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the copying, you may not be able to visit any other tab in your browser.

Another option is to transfer the individual amounts of each bill from a particular provider for a particular plaintiff to the Lien Tracking page as a group of liens, each one reflecting the amount of a single corresponding bill. The amounts will be equal to the Negotiated Bill Amount column in the corresponding rows of the Medical Bills table (or the Bill Amount column in rows where the Negotiated Bill Amount is blank); this is the only one of the three methods that includes the negotiation of the bills. To do so:

1. Click the [right-click icon](#) in the Action column of the row of the Medical Providers table representing the medical provider whose bills you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy all bills to liens option in the menu. This will bring up a confirmation message.
3. Click the OK button in the message to confirm the copying.
 - If you decide you do not wish to copy the bill, click Cancel instead of clicking OK to cancel the copying. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the copying, you may not be able to visit any other tab in your browser.

The last option is to transfer the amount of a single bill to the Lien Tracking page as a single lien reflecting the amount of that bill. The amount will be equal to the Bill Amount column in the corresponding row of the Medical Bills table; it will not take into account any negotiation of the bill. To do so:

1. Click the [right-click icon](#) in the Action column of the row of the Medical Bills table representing the medical bill you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy Bill To Liens option in the menu. This will bring up a confirmation message.
3. Click the OK button in the message to confirm the copying.
 - If you decide you do not wish to copy the bill, click Cancel instead of clicking OK to cancel the copying. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the copying, you may not be able to visit any other tab in your browser.

The Add/Edit Medical Bill Panel

The Add/Edit Medical Bill Panel allows you to fill in the details of a medical bill. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Add/Edit Bill' panel with the following fields and callouts:

- 1: Associated Medical Visit: Visit at 12/19/2017 Ambulance
- 2: Bill #: [Empty text box]
- 3: Account #: 65665463543
- 4: Bill Amount: \$800
- 5: Negotiated Bill Amount: \$550
- 6: Date From: /2017
- 7: Date To: /2017
- 8: Submit Date: [Empty date box]
- 9: Comments: [Empty text area]

Buttons: Save, Cancel

Created at 12/19/2017 3:47:00 PM by Simpson, Claude, Esq.,

1. Associated Medical Visit: Which visit to the medical provider is the source of the bill.
2. Bill #: The identification number of the bill.
3. Account #: The identification number of the account the bill is part of.
4. Bill Amount: The initial amount of the bill.
5. Negotiated Bill Amount: The amount of the bill after negotiation and/or other discounting.
6. Date From: The start date of the period of the medical visit included in the bill.
7. Date To: The end date of the period of the medical visit included in the bill.
8. Submit date: The date the bill was issued by the medical provider or billing service.
9. Comments: Any comments about the bill.

Amount Paid Table

The Amount Paid table is where the details of payments on medical bills are stored. The Amount Paid table is a subtable of the [Medical Providers Table](#), which means that each row of the Medical Providers table has an individual Amount Paid table associated with it, which is specific to the medical provider in that row; open a row of the Medical Providers table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Amount Paid table. Each row of the table represents an individual payment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Amount Paid table may contains the following columns:

| Associated Medical Bill | Claim Submitted Date | Paid Date | Paid By | Collateral | Paid Amount | Comments | Action |
|---------------------------------|----------------------|-----------|------------------------------|--------------------------------|-------------|----------|--------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| Bills: (12/4/2017 - 12/14/2017) | | | Insurance Company Of Hanover | Disability Insurance - State | \$300.00 | | |
| Bills: (12/4/2017 - 12/14/2017) | | | GEICO | Private Medical Insurance | \$700.00 | | |
| Bills: (12/4/2017 - 12/14/2017) | | | Insurance Company Of Hanover | Disability Insurance - Private | \$1,000.00 | | |

Page 1 of 1 (3 items) | Show/Hide Columns

1. Associated Medical Bill: Which medical bill from the provider the payment is for.
2. Claim Submitted Date: The date the claim was made to the insurer regarding the bill.
3. Paid Date: The date the payment was made.
4. Paid By: The contact that made the payment.
5. Collateral: The type of compensation being used to pay the bill.
6. Paid Amount: The amount being paid toward the bill.
7. Comments: Any comments about the payment.
8. Action: A Right-click icon; the right-click menu contains Edit Amount, Delete Amount, and Copy Payment to Liens.

Editing a Medical Payment

To edit a medical payment:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the payment you wish to edit. This will bring up an Add/Edit panel for medical payments, with the existing information filled in. Skip to step 3.
2. Click the Edit Amount option in the menu. This will bring up an Add/Edit panel for medical payments, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Amount Paid Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - a. If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Medical Payment

To delete a medical payment:

1. Click the **right-click icon** in the Action column of the row representing the payment you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the **Delete icon** in the Actions column of the row representing the payment you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete Amount option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the payment, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Medical Payment

To add a new medical payment:

1. If the row representing the medical provider you wish to add the payment to is not open, click the open/close icon (plus sign to open, minus sign to close) for the row. This will reveal the Amount Paid subtable for that row.
2. Click the Add Amount Paid button. This will bring up an Add/Edit panel for medical payments, completely blank.
3. Fill the fields in with your desired information. See [The Add/Edit Amount Paid Panel](#) for details about the fields.
4. Click Update to save the payment and close the panel.
 - If you decide you do not wish to save the payment, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Amount Paid Panel

The Add/Edit Amount Paid Panel allows you to fill in the details of a medical payment. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Add/Edit Amount Paid' panel with the following fields and callouts:

- 1: Associated Medical Bill (dropdown menu)
- 2: Collateral (dropdown menu)
- 3: Claim Submitted Date (calendar icon)
- 4: Paid Date (calendar icon)
- 5: Paid By (dropdown menu)
- 6: Paid Amount (text input field)
- 7: Comments (text area)

Buttons at the bottom: Save, Cancel. Footer: Created at 12/19/2017 3:48:00 PM by Simpson, Claude, Esq.,.

1. Associated Medical Bill: Which visit to the medical provider is the source of the bill.
2. Collateral: The type of compensation being used to pay the bill.
3. Claim Submitted Date: The date the claim was made to the insurer regarding the bill.
4. Paid Date: The date the payment was made.
5. Paid By: The contact that paid the bill.
6. Paid Amount: The amount being paid toward the bill
7. Comments: Any comments about the amount paid.

Medical Requests Table

The Medical Requests table is where the details of medical record requests are stored. Each row of the table represents an individual request. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Medical Requests table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
|------------|----------------------|--|--------------|-----------------------|-----------------|------------------|-----------|-----------|----------------------------|-----------------------|---|-----------|----------|-------------|----------------|--------|
| Request ID | Patient | Provider | Request Date | Requested By | Assigned To | Record Type | From | To | Comments | Created By | Request Info | Completed | Status | Status Date | Follow Up Date | Action |
| | Gingelhymer, John A. | Roosevelt Hospital Division - Medical Records Dept | 7/5/2017 | Simpson, Claude, Esq. | Simpson, Claude | Hospital Records | 1/20/2015 | 7/5/2017 | Sent to expert for review. | Simpson, Claude, Esq. | Hospital Records requested from 1/20/2015 to 7/5/2017 by Simpson, Claude, Esq. assigned to Simpson, Claude, Esq. | 4/3/2018 | Received | 7/5/2017 | 8/23/2017 | |
| | Gingelhymer, John A. | Roosevelt Hospital Division - Medical Records Dept | 7/22/2017 | Simpson, Claude, Esq. | Simpson, Claude | Hospital Records | 1/20/2015 | 7/22/2017 | | Simpson, Claude, Esq. | Hospital Records requested from 1/20/2015 to 7/22/2017 by Simpson, Claude, Esq. assigned to Simpson, Claude, Esq. | | Internal | 7/22/2017 | 8/23/2017 | |
| | Gingelhymer, John A. | Roosevelt Hospital Division - Medical Records Dept | 7/22/2017 | Simpson, Claude, Esq. | Simpson, Claude | Hospital Records | 1/20/2015 | 7/22/2017 | | Simpson, Claude, Esq. | Hospital Records requested from 1/20/2015 to 7/22/2017 by Simpson, Claude, Esq. assigned to Simpson, Claude, Esq. | | Internal | 7/22/2017 | 7/22/2017 | |

? Unknown Attachment

1. [Priority]: The priority level of the request.
2. Plaintiff: The plaintiff whose medical records are being requested.
3. Provider: The medical provider receiving the request.
4. Request Date: The date the record request was made.
5. Requested By: The person within your firm who requested the records.
6. Assigned To: The person within your firm who has been assigned with requesting the medical records.
7. Record Type: The type of records being requested from the medical provider.
8. From: The start date of the period the records being requested cover.
9. To: The end date of the period the records being requested cover.
10. Comments: Any comments about the request.
11. Created By: The person in your firm who created the medical request.
12. Request Info: The details of the request (the type of records being requested, dates covered, staff member making the request, and staff member responsible for following up on the request).
13. Completed @: The date the request reached its final status.
14. Status: The current status of the request.
15. Status Date: The date the request reached its current status.
16. FollowUp Date: The date the request should be followed up on if no response is received.
17. Action: A Right-click icon; the right-click menu contains Edit Bill, Delete Bill, and Copy Bill to Liens.

Editing a Medical Record Request

To edit a medical record request:

1. Click the [right-click icon](#) in the Action column of the row representing the request you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the request you wish to edit. This will bring up an Add/Edit panel for medical record requests, with the existing information filled in. Skip to step 3.
2. Click the Edit Request option in the menu. This will bring up an Add/Edit panel for medical record requests, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Medical Record Request Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - If you wish to generate the record request document at the same time as you save the changes, click Update & Generate instead of clicking Update to save the changes, close the Add/Edit panel, and open the medical request generation panel. See [Generating the Medical Record Request Document](#) for details about the panel.

Deleting a Medical Record Request

To delete a medical record request:

1. Click the [right-click icon](#) in the Action column of the row representing the request you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the request you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete Request option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the request, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Medical Record Request

To add a new medical record request:

1. Click the Add Medical Request button. This will bring up an Add/Edit panel for medical record requests, blank except for defaults.
 - Alternatively, if you wish to make a request regarding a particular provider, there are two ways to do so. One is to click the Add Request icon in the Actions column of the row representing the medical provider whose records you wish to request. The other is to click the [right-click icon](#) in the Action column of the row representing the medical provider whose records you wish to request, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Request option in the menu. Either method will bring up an Add/Edit panel for medical record requests, with the Plaintiff, Provider, From, and To fields matching the medical provider's Plaintiff, Provider, Start Date, and End Date columns.
 - There is yet another alternative if you wish to make a request regarding a particular visit to a medical provider, and again there are two ways to do so. One is to click the Add Request icon in the Actions column of the row representing the medical visit you wish to request the records of. The other is to click the [right-click icon](#) in the Action column of the row representing the medical visit you wish to request the records of, or right-click anywhere in that row. This will bring up a menu of options. Click the Add Request option in the menu. Either method will bring up an Add/Edit panel for medical record requests, with the Plaintiff and Provider fields matching the medical provider's Plaintiff, and Provider columns, and the From and To fields matching the medical visit's Start Date and End Date columns.
2. Fill the fields in with your desired information. See [The Add/Edit Medical Record Request Panel](#) for details about the fields.
3. Click Update to save the request and close the panel.
 - If you decide you do not wish to save the request, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - If you wish to generate the record request document at the same time as you save the request, click Update & Generate instead of clicking Update to save the request, close the Add/Edit panel, and open the medical request generation panel. See [Generating the Medical Record Request Document](#) for details about the panel.

Generating the Medical Record Request Document

To generate the medical record request document:

1. Click the [right-click icon](#) in the Action column of the row representing the request you wish to generate the document for, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the Generate Request icon in the Actions column of the row representing the request you wish to edit. This will bring up the medical request generation panel. Skip to step 3.
 - Another alternative is to click Update & Generate when editing or adding a medical record request. This will save the request and then bring up the medical request generation panel. Skip to step 3.
2. Click the Generate Request option in the menu. This will bring up the medical request generation panel.
3. Fill the fields in with your desired information. See [The Medical Request Generation Panel](#) for details about the fields.
4. Click OK to generate the document and close the panel.
 - If you decide you do not wish to generate the document, click the white X at the upper right of the panel instead of clicking OK to undo any selections and close the panel.
 - The document will be generated from the template associated with the record type of the request. See the [Medical Record Request Types](#) administrative page for managing record types and associating document templates with them.
 - Generating the document will automatically change the status of the request to External (even if you had just edited or added the request with a different status).

Marking a Request for Follow-up

You can quickly change the follow-up date of a request to the current date. This can be useful for indicating that a request needs to be followed up on as soon as possible. To do so, click the [right-click icon](#) in the Action column of the row representing the request whose follow-up date you wish to change, or right-click anywhere in that row. This will bring up a menu of options. Click the Mark For Follow-Up option in the menu. Alternatively, you can click the Mark For Follow-Up icon in the Actions column of the row representing the request whose follow-up date you wish to change.

Canceling a Request

You can quickly change the status of a request to Canceled. This can be a little easier than editing the request since, if the request is being canceled, the only aspect of the request that is still relevant is the status. To do so, click the [right-click icon](#) in the Action column of the row representing the request whose status you wish to change, or right-click anywhere in that row. This will bring up a menu of options. Click the Cancel Request option in the menu. Alternatively, you can click the Cancel Request icon in the Actions column of the row representing the request you wish to edit.

Sending a Request to a Records Retrieval Service

If you have an integration with a medical records retrieval service, you can send a medical record request directly to that service from the Medical Providers page. To do so:

1. Click the [right-click icon](#) in the Action column of the row representing the request you wish to send to the retrieval service, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Send to Retrieval Service option in the menu. This will bring up a panel for adding details to the request.
3. Fill the fields in with your desired information. See [The Record Request Sending Panel](#) for details about the fields.
4. Click Send to send the request and close the panel.
 - If you decide you do not wish to send the request, click Cancel instead of clicking Send to undo any changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Medical Record Request Panel

The Add/Edit Medical Record Request Panel allows you to fill in the details of a medical record request. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Add/Edit Medical Request' form with the following fields and callouts:

- 1: Plaintiff (Montgomery, Colin)
- 2: Provider (Abbeville General Hospital)
- 3: Request Date (03/2018)
- 4: Assigned To (Dreier, Harry)
- 5: Send Email checkbox
- 6: From (06/2014)
- 7: Select all dates checkbox
- 8: To (08/08/20)
- 9: Until Today checkbox
- 10: FollowUp Date
- 11: Record Type (Record)
- 12: Priority (Normal)
- 13: Status (Internal)
- 14: Status Date (01/2018)
- 15: Requested By (Dreier, Harry)
- 16: Comments text area
- 17: Provider Notes text area
- 18: Retrieval Provider Notes text area
- 19: Attach button
- 20: Select button
- 21: None of the Documents are selected (text in the Related Documents table)

At the bottom of the form, there are buttons for 'Save & Send to Retrieval Service', 'Save & Generate', 'Save', and 'Cancel'. The status bar at the bottom left reads 'Created at 8/8/2018 1:32:00 PM by Dreier, Harry.'

1. Plaintiff: The plaintiff whose medical records are being requested.
2. Provider: The medical provider receiving the request.
3. Request Date: The date the record request was made.
4. Assigned To: The staff member responsible for following up on the request. The dropdown will show a list of staff members designated as Medical Records Clerks on top of the list.
5. Send Email: [Checkbox] When checked, an email will be sent to the staff designated as "Assigned To" notifying the staff member that the medical records request was assigned to him/her or was updated, as appropriate.
6. From: The start date of the period the records being requested cover. This field is uneditable if Select all dates is selected.
7. Select all dates: If selected, the request will cover "all available dates," regardless of the From and To fields.
8. To: The end date of the period the records being requested cover. This field is uneditable if Select all dates or Until Today is selected.
9. Until Today: If selected, the request will cover dates up "to present," regardless of the To field.
10. FollowUp Date: The date the request should be followed up on if no response is received. If this field is left blank when changes are saved, the previous value of the field, if any, will be used.
11. Record Type: The type of records being requested.
12. Priority: The priority level of the request.
13. Status: The current status of the request.
14. Status Date: The date the request reached its current status. If this field is left blank when changes are saved, the current date will be used.
15. Requested By: The person in your firm who is making this request. Upon creation of the request, this field default to the user who created the request.
16. Comments: Any comments about the request.
17. Provider Notes: Any notes about the medical provider.
18. Retrieval Provider Notes: Any notes received from the medical records retrieval company in connection with the request.
19. Attach: Allows you to attach any document on your computer or your network to attach to the request.
20. Select: Allows you to select any document in the case to attach to the request.
21. Related Documents: List of documents in the case that have been attached to this request.

Other Providers

The Other Providers page allows you to view and record the details of service providers whose services were necessitated by the inciting incident of the case, other than direct medical providers, and whose charges are considered special damages. Bills from providers listed on the Other Providers page, like those from providers on the [Medical Providers](#) page, are automatically listed on the [Special Damages](#) page; however, in other ways, Other Providers provide a different functionality than Medical Providers. For this reason, if you need the records from a provider for the case, if the provider might reasonably serve as an expert, or if you need to detail the individual visits to the provider, you should use the Medical Providers page instead; otherwise, the Other Providers page may be simpler and easier to use.

The Structure of This Page

Note: The Add Bill Details button, Bill Details table, Add Amount Paid button, and Amount Paid table are all associated with an individual row of the Other Providers table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Other Providers page, and where in the Other Providers table they appear, will depend on which row, if any, of the Other Providers table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot shows the 'Other Providers' interface. At the top, there is an 'Add Other Provider' button (1). Below it is a table of providers. The first row is highlighted in yellow and contains the following data: Plaintiff: Gngaphymes, Smeryna; Provider Name: Richmond County Ambulance (Phone: (718) 273-3555, Contact Name: Robinson, A. Seth, Contact Person Phone: (914) 555-1212); Provider Type: Ambulance Services; Treatment Start: 9/1/2017; Treatment End: 9/1/2017; Visits: 9; Total Bill: \$800.00; Docs: 0; Comments: ; Action: (right-click icon). A plus sign (+) is in the Action column (2). Below the provider table is an 'Add Bill Details' subtable (3). The first row of this subtable is highlighted in yellow and contains: Bill #: 12345; Account #: 67890; Bill Amount: \$800.00; Negotiated Bill Amount: \$450.00; Submit date: 10/2/2017; Date From: 9/1/2017; Date To: 9/1/2017; Balance Amount: \$0.00. A plus sign (+) is in the Action column (4). Below the bill details is an 'Add Amount Paid' subtable (5). The first row is highlighted in yellow and contains: Associated Medical Bill: B#12345 (9/1/2017 - 9/1/2017); Claim Submitted Date: 9/29/2017; Paid Date: 12/4/2017; Paid By: GEICO; Collateral: Private Medical Insurance; Paid Amount: \$450.00. A plus sign (+) is in the Action column (6). At the bottom, there is another provider row for 'Home Health Care' with a plus sign (+) in the Action column.

1. Add Other Provider button: Used to add a new service provider to the case file. See [Adding a Service Provider](#).
2. Other Providers table: Contains the service provider details and allows various actions to be performed on them. See [Other Providers Table](#).
3. Add Bill Details button: Used to add a new bill to the case file. See [Adding a Bill](#).
4. Bill Details table: Contains the bill details for a particular service provider and allows various actions to be performed on them. See [Bill Details Table](#).
5. Add Amount Paid button: Used to add a payment of a bill to the case file. See [Adding a Bill Payment](#).
6. Amount Paid table: Contains the payment details of bills from a particular service provider and allows various actions to be performed on them. See [Amount Paid Table](#).

Other Providers Table

The Other Providers table is where the details of service providers are stored. Each row of the table represents an individual service provider and an individual plaintiff who obtained services from that provider. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Other Providers table contains the following available columns:

The screenshot shows the 'Other Providers' table with columns numbered 1 through 11. Column 1 is the plus sign (+) in the Action column. Column 2 is the Plaintiff column. Column 3 is the Provider Name column. Column 4 is the Provider Type column. Column 5 is the Treatment Start column. Column 6 is the Treatment End column. Column 7 is the Visits column. Column 8 is the Total Bill column. Column 9 is the Docs column. Column 10 is the Comments column. Column 11 is the Action column (right-click icon).

1. [column with no title]: A plus sign (+) in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Bill Details and Amount Paid for that Service Provider). Clicking on the plus sign opens the Bill Details / Amount Paid subtables for that service provider. The plus sign then turns into a negative sign (-) which, when clicked, closes the subtable.
2. Plaintiff: The plaintiff who obtained services from the provider.
3. Provider Name: The provider who provided services to the plaintiff.
4. Provider Type: The type of services provided by the provider.
5. Treatment Start: The date the provider first provided services to the plaintiff.
6. Treatment End: The date the provider stopped providing services to the plaintiff.
7. Visits: The number of visits to the service provider.
8. Total Bill: The sum of all bills from the service provider.
9. Docs: The number of documents associated with the service provider and a link to the documents in the [Documents](#) case page.
10. Comments: Any comments about the service provider.
11. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Service Provider

To edit a service provider:

1. Click the [right-click icon](#) in the Action column of the row representing the provider you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the provider you wish to edit. This will bring up an Add/Edit panel for service providers, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for service providers, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Other Provider Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Service Provider

To delete a service provider:

1. Click the [right-click icon](#) in the Action column of the row representing the provider you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the provider you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the provider, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Service Provider

To add a new service provider:

1. Click the Add Other Provider button. This will bring up an Add/Edit panel for service providers, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Other Provider Panel](#) for details about the fields.
3. Click Save to save the provider and close the panel.
 - If you decide you do not wish to save the provider, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Other Provider Panel

The Add/Edit Other Provider Panel allows you to fill in the details of a service provider. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Provider' panel with the following fields and callouts:

- 1: Plaintiff* dropdown menu (Ginglehymer, Smeryna (D))
- 2: Provider Name* dropdown menu (Richmond County Ambulance, 1355 Castleton Avenue, Staten Island, NY)
- 3: Contact Name dropdown menu (Robinson, A. Seth, 621 Greatview Avenue, Yonkers, NY 10514)
- 4: Provider Type dropdown menu (Ambulance Services)
- 5: Visits input field
- 6: Treatment Start* dropdown menu (09/01/2017)
- 7: Treatment End dropdown menu (09/01/2017)
- 8: Comments text area (Ambulance was involved in a motor vehicle accident on the way to the hospital.)

Buttons: Save, Cancel

Created at 1/31/2018 2:51:00 PM by Dreier, Harry.

1. Plaintiff: The plaintiff who obtained services from the provider.
2. Provider Name: The provider who provided services to the plaintiff.
3. Contact Name: The person at the Provider who is your contact.
4. Provider Type: The type of services provided by the provider.
5. Visits: The number of visits to the service provider.
6. Treatment Start: The date the provider first provided services to the plaintiff.
7. Treatment End: The date the provider stopped providing services to the plaintiff.
8. Comments: Any comments about the service provider.

Bill Details Table

The Bill Details table is where the details of bills from service providers are stored. The Bill Details table is a subtable of the [Other Providers Table](#), which means that each row of the Other Providers table has an individual Bill Details table associated with it, which is specific to the provider in that row; open a row of the Other Providers table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Bill Details table. Each row of the table represents an individual bill. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Bill Details table contains the following available columns:

The screenshot shows the Bill Details table with the following columns and callouts:

| Bill # | Account # | Bill Amount | Negotiated Bill Amount | Submit date | Date From | Date To | Balance Amount | Comments | Action |
|--------|-----------|-------------|------------------------|-------------|-----------|----------|----------------|----------|--------|
| 12345 | 67890 | \$800.00 | \$450.00 | 10/2/2017 | 9/1/2017 | 9/1/2017 | \$0.00 | | |

Page 1 of 1 (1 items) | Show/Hide Columns

1. Bill #: The identification number of the bill.

2. Account #: The identification number of the account the bill is part of.
3. Bill Amount: The initial amount of the bill.
4. Negotiated Bill Amount: The amount of the bill after negotiation and/or other discounting.
5. Submit date: The date the bill was issued by the service provider or billing service.
6. Date From: The start date of the period of services included in the bill.
7. Date To: The end date of the period of services included in the bill.
8. Balance Amount: The outstanding balance on the bill. This amount is automatically calculated. If the Negotiated Bill Amount field is not blank, then this column equals the amount in the Negotiated Bill Amount field minus the sum of the Paid Amount column for all rows in the Amount Paid table associated with the bill; otherwise, this column equals the amount in the Bill Amount field minus the sum of the Paid Amount column for all rows in the Amount Paid table associated with the bill
9. Comments: Any comments about the bill.
10. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Bill

To edit a bill:

1. Click the [right-click icon](#) in the Action column of the row representing the bill you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the bill you wish to edit. This will bring up an Add/Edit panel for bills, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for bills, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Bill Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Bill

To delete a bill:

1. Click the [right-click icon](#) in the Action column of the row representing the bill you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the bill you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the bill, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Bill

To add a new bill:

1. If the row representing the service provider you wish to add the bill to is not open (its open/close icon is a plus sign), click the open/close icon for the row. This will reveal the Bill Details subtable for that row.
2. Click the Add Bill Details button. This will bring up an Add/Edit panel for bills, completely blank.
3. Fill the fields in with your desired information. See [The Add/Edit Bill Panel](#) for details about the fields.
4. Click Save to save the bill and close the panel.
 - If you decide you do not wish to save the bill, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Bill Panel

The Add/Edit Bill Panel allows you to fill in the details of a bill from a service provider. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows a web form titled "Edit Bill Payment Details" with a close button (X) in the top right corner. The form contains the following fields, each with a red circle and a number indicating its position:

- 1. Bill #: 12345
- 2. Account #: 67890
- 3. Bill Amount: \$800
- 4. Negotiated Bill Amount: \$450
- 5. Date From: 09/01/2017
- 6. Date To: 09/01/2017
- 7. Submit date: 10/02/2017
- 8. Comments: (empty text area)

At the bottom of the form, there is a footer that reads "Created at 4/2/2018 3:02:00 PM by Dreier, Harry." and two buttons: "Save" and "Cancel".

1. Bill #: The identification number of the bill.

2. Account #: The identification number of the account the bill is part of.
3. Bill Amount: The initial amount of the bill.
4. Negotiated Bill Amount: The amount of the bill after negotiation and/or other discounting.
5. Date From: The start date of the period of services included in the bill.
6. Date To: The end date of the period of services included in the bill
7. Submit date: The date the bill was issued by the service provider or billing service.
8. Comments: Any comments about the bill.

Amount Paid Table

The Amount Paid table is where the details of bill payments are stored. The Amount Paid table is a subtable of the [Other Providers Table](#), which means that each row of the Other Providers table has an individual Amount Paid table associated with it, which is specific to the provider in that row; open a row of the Other Providers table using the open/close icon to reveal the associated Amount Paid table. Each row of the table represents an individual payment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Amount Paid table contains the following available columns:

| Add Amount Paid | Associated Medical Bill | Claim Submitted Date | Paid Date | Paid By | Collateral | Paid Amount | Action |
|-----------------|-----------------------------------|----------------------|-----------|---------|---------------------------|-------------|--------|
| | Bill# 12345 (9/1/2017 - 9/1/2017) | 9/29/2017 | 12/4/2017 | GESCO | Private Medical Insurance | \$450.00 | |

1. Associated Medical Bill: Which bill from the service provider the payment is for. The bill must have been entered in the Bill Details table.
2. Claim Submitted Date: The date the claim was made to the insurer regarding the bill.
3. Paid Date: The date the payment was made.
4. Paid By: The contact that made the payment.
5. Collateral: The type of compensation being used to pay the bill.
6. Paid Amount: The amount being paid toward the bill.
7. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Bill Payment

To edit a bill payment:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the payment you wish to edit. This will bring up an Add/Edit panel for bill payments, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for bill payments, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Amount Paid Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Bill Payment

To delete a bill payment:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the payment you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the payment, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Bill Payment

To add a new bill payment:

1. If the row representing the service provider you wish to add the payment to is not open, click the open/close icons (plus sign to open, minus sign to close). This will reveal the Amount Paid subtable for that row.
2. Click the Add Amount Paid button. This will bring up an Add/Edit panel for bill payments, completely blank.
3. Fill the fields in with your desired information. See [The Add/Edit Amount Paid Panel](#) for details about the fields.
4. Click Update to save the payment and close the panel.
 - If you decide you do not wish to save the payment, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Amount Paid Panel

The Add/Edit Amount Paid Panel allows you to fill in the details of a bill payment. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Add/Edit Amount Paid ✖

Associated Medical Bill* 1

Collateral* 2

Claim Submitted Date 3

Paid Date 4

Paid By* 5

Paid Amount* 6

Created at 4/2/2018 3:04:00 PM by Dreier, Harry. Save Cancel

1. Associated Medical Bill: Which bill from the service provider the payment is for.
2. Collateral: The type of compensation being used to pay the bill.
3. Claim Submitted Date: The date the claim was made to the insurer regarding the bill.
4. Paid Date: The date the payment was made.
5. Paid By: The contact that made the payment.
6. Paid Amount: The amount being paid toward the bill.

Adverse Exams

The Adverse Exams page allows you to view and record the details of independent or adverse medical examinations.

The Structure of This Page

Note: The Add Exam Details button and Adverse Exam Details table are both associated with an individual row of the Adverse Exams table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Adverse Exams page, and where in the Adverse Exams table they appear, will depend on which row, if any, of the Adverse Exams table is set to display subtables. See [Subtables and the Open/Closed Column](#).

| Add Adverse Exam | | | | | | | | | | | Adverse Exams | | | | | | | | | | | Export | |
|------------------------|----------------------------------|---------------------------|----------------------------|--------------------|----------------|--------------------------------------|--------|--------------|------|------|----------------------|--|--|--|--|--|--|--|--|--|--|--------|--|
| Plaintiff | Examiner | Exam Type | Scheduling Agency | Insurance Company | Contact | Location | Expert | Will Testify | Held | Docs | Actions | | | | | | | | | | | | |
| Robinson, Terry-Ann E. | Malodnes, Michael, M.D. | No Fault | Third Party Adjusters, LLC | GEICO | (854) 555-1212 | 5 Medical Park Rd Columbia SC 29203 | Yes | Yes | | | | | | | | | | | | | | | |
| Add Exam Details | | | | | | | | | | | Adverse Exam Details | | | | | | | | | | | | |
| Exam Date | Benefit Desired | Cut-Off Date | Record Dates | Report Dates | Comments | | | | | | Actions | | | | | | | | | | | | |
| No data to display | | | | | | | | | | | | | | | | | | | | | | | |
| Robinson, A. Seth | GEH Adjusters LTD | Defendant's Physical Exam | State Farm Insurance | MetLife Disability | (845) 555-1212 | 55 Northern Blvd Great Neck NY 11021 | Yes | No | | | | | | | | | | | | | | | |
| Robinson, Terry-Ann E. | Good Samaritan Memorial Hospital | Defendant's Physical Exam | GEICO | GEICO | (800) 841-8380 | | ? | ? | | | | | | | | | | | | | | | |







1. Add Adverse Exam button. Used to add a new examination to the case file. See [Adding an Examination](#).
2. Adverse Exams table. Contains the personnel and location details of examinations and allows various actions to be performed on them. See [Adverse Exams Table](#).
3. Add Exam Details button. Used to add the scheduling and outcome details of a particular examination to the case file. See [Adding Examination Details](#).
4. Adverse Exam Details table. Contains the scheduling and outcome details of examinations and allows various actions to be performed on them. See [Adverse Exam Details Table](#).



Adverse Exams Table

The Adverse Exams table is where the personnel and location details of examinations are stored. Each row of the table represents an individual examination (or set of examinations, if for some reason the examination requires more than one appointment). See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Adverse Exams table contains the following available columns:

| Add Adverse Exam | | Adverse Exams | | | | | | | | | | Export |
|------------------------|----------------------------------|---------------------------|----------------------------|--------------------|----------------|--------------------------------------|--------|--------------|-------------------------------------|------|---|--------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| Plaintiff | Examiner | Exam Type | Scheduling Agency | Insurance Company | Contact | Location | Expert | Will Testify | Held | Docs | Actions | |
| Robinson, Terry Ann L. | Holobrer, Michael, M.D. | No Fault | Third Party Adjusters, LLC | GEICO | (854) 555-1212 | 5 Medical Park Rd Columbia SC 29205 | Yes | Yes | <input checked="" type="checkbox"/> | 0 |   | |
| EDMONSON, CLAUDE R. | GEN Adjusters LTD | Defendant's Physical Exam | State Farm Insurance | Hercule Disability | (845) 555-1212 | 55 Northern Blvd Great Neck NY 11021 | Yes | No | <input type="checkbox"/> | 0 |   | |
| Robinson, Terry Ann L. | Good Samaritan Memorial Hospital | Defendant's Physical Exam | GEICO | GEICO | (800) 961-8380 | | ? | ? | <input type="checkbox"/> | 1 |   | |

- [column with no title]: A plus sign  in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Adverse Exam Details). Clicking on the plus sign opens the Adverse Exam Details subtables for that examination. The plus sign then turns into a negative sign  which, when clicked, closes the subtable.
- Plaintiff: The plaintiff being examined.
- Examiner: The doctor performing the examination.
- Exam Type: The purpose of the examination (generally the benefits being contested).
- Scheduling Agency: The scheduling agency supplying the examiner.
- Insurance Company: The insurance company requesting the examination.
- Contact: The phone number of the scheduling agency.
- Location: The location of the examination.
- Expert: Whether the examiner is also acting as an expert.
- Will Testify: Whether the examiner is willing to testify.
- Held: Whether the examination has occurred.
- Docs: The number of documents associated with the examination and a link to the documents in the [Documents](#) case page.
- Actions: Contains an [Edit icon](#) and a [Delete icon](#).

Editing an Examination

To edit an examination:

- Right-click anywhere in the row representing the examination you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the examination you wish to edit. This will bring up an Add/Edit panel for examinations, with the existing information filled in. Skip to step 3.
- Click the Edit option in the menu. This will bring up an Add/Edit panel for examinations, with the existing information filled in.
- Fill the fields in with your desired information. See [The Add/Edit Examination Panel](#) for details about the fields.
- Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Examination

To delete an examination:

- Right-click anywhere in the row representing the examination you wish to delete. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the examination you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
- Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the examination, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Examination

To add a new examination:

- Click the Add Adverse Exam button. This will bring up an Add/Edit panel for examinations, completely blank.
- Fill the fields in with your desired information. See [The Add/Edit Examination Panel](#) for details about the fields.
- Click Save to save the examination and close the panel.
 - If you decide you do not wish to save the examination, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Examination Panel

The Add/Edit Examination Panel allows you to fill in the personnel and location details of an examination. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Adverse Exam ✕

Plaintiff:* **1** Robinson, Ann I. Exam Type:* **2** No Fault

Doctor's Name:* **3** Molodner, Michael, M **4** Use Location

Scheduling Agency:* **5** Third Party Adjusters, LLC **6** Use as Location

Insurance Company: **7** GEICO, PO Box 9506, Fredericksburg, VA 22403

Location: **8** 5 Medical Park Rd
Columbia
SC 29203

Expert: **9** Yes **10** Will Testify: Yes **11** Held

Created at 12/8/2015 3:24:00 PM by Admin, A..
Modified at 4/3/2018 8:20:00 AM by Dreier, Harry.

1. Plaintiff: The plaintiff being examined.
2. Exam Type: The purpose of the examination (generally the benefits being contested).
3. Doctor's Name: The doctor performing the examination.
4. Use Location [Doctor]: Button to insert the Doctor's address as the location for the examination.
5. Scheduling Agency: The scheduling agency supplying the examiner.
6. Use Location [Scheduling Agency]: Button to insert the Scheduling Agency's address as the location for the examination.
7. Insurance Company: The insurance company requesting the examination.
8. Location: The location of the examination. This field can be completed manually or by clicking on one of the two Use as Location buttons.
9. Expert: Whether the examiner is also acting as an expert.
10. Will Testify: Whether the examiner is willing to testify.
11. Held: Whether the examination has occurred.

Adverse Exam Details Table

The Adverse Exam Details table is where the scheduling and outcome details of examinations are stored. The Adverse Exam Details table is a subtable of the Adverse Exams table, which means that each row of the Adverse Exams table has an individual Adverse Exam Details table associated with it, which is specific to the examination in that row; open a row of the Adverse Exams table using the open/close icon (plus sign to open, minus sign to close) to reveal the associated Adverse Exam Details table. Each row of the table represents an individual examination appointment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Adverse Exam Details table contains the following available columns:

| Add Exam Details | | | Adverse Exam Details | | | | | |
|-------------------|-----------------------------------|-------------------|--|---|----------|----------|--|--|
| Exam Date | Benefit Denied | Cut-Off Date | Record Dates | Report Dates | Comments | Actions | | |
| 1 2/5/2018 | 2 <input type="checkbox"/> | 3 4/9/2018 | 4 Record Requested: 2/13/2018 Record Received: 3/13/2018 | 5 Report Requested: 2/13/2018 Report Received: 3/7/2018 | 6 | 7 | | |

[Show/Hide Columns](#)

1. Exam Date: The date of the examination appointment.
2. Benefit Denied: Whether (as a result of the examination) benefits were denied to the plaintiff.
3. Cut-Off Date: The date on which benefits to the plaintiff are to cease as a result of the examination.
4. Record Dates: The dates the medical records from the examination were requested and received.
5. Report Dates: The dates the examiner's reports from the examination were requested and received.
6. Comments: Any comments about the examination.
7. Actions: An Edit icon and a Delete icon.

Editing Examination Details

To edit examination details:

1. Right-click anywhere in the row representing the examination details you wish to edit. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the examination details you wish to edit. This will bring up an Add/Edit panel for examination details, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for examination details, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Examination Details Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Examination Details

To delete examination details:

- Right-click anywhere in the row representing the examination details you wish to delete. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the examination details you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
- Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the examination details, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Examination Details

To add new examination details:

- If the row representing the examination you wish to add the details to is not open, click the open/close icon (plus sign to open, minus sign to close) for the row. This will reveal the Adverse Exam Details subtable for that row.
- Click the Add Exam Details button. This will bring up an Add/Edit panel for examination details, completely blank.
- Fill the fields in with your desired information. See [The Add/Edit Examination Details Panel](#) for details about the fields.
- Click Save to save the examination details and close the panel.
 - If you decide you do not wish to save the examination details, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Examination Details Panel

The Add/Edit Examination Details Panel allows you to fill in the scheduling and outcome details of an examination. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Adverse Exam Details' panel with the following fields and callouts:

- 1: Exam Date (month/day/year)
- 2: Exam Time (hour)
- 3: Calendar button
- 4: Benefit Denied checkbox
- 5: Cut-Off Date (month/day/year)
- 6: Request Sent Date [Reports] (month/day/year)
- 7: Expected Date [Reports] (month/day/year)
- 8: Received Date [Reports] (month/day/year)
- 9: Request Sent Date [Records] (month/day/year)
- 10: Expected Date [Records] (month/day/year)
- 11: Received Date [Records] (month/day/year)
- 12: Comments text area

Buttons for 'Save' and 'Cancel' are located at the bottom right of the panel.

- Exam Date: The date of the examination appointment.
- Exam Time (unlabeled): The time of the examination appointment.
- Calendar: Opens an Appointment panel from the Case Calendar that can be filled in with the Adverse Exam Appointment details (when, where, attendees, etc.).
- Benefit Denied: Whether (as a result of the examination) benefits were denied to the plaintiff .
- Cut-Off Date: The date on which benefits to the plaintiff are to cease as a result of the examination.
- Request Sent Date [Reports]: The date the medical records from the examination were requested.
- Expected Date [Reports]: The date the medical records from the examination are expected to arrive.
- Received Date [Reports]: The date the medical records from the examination were received.
- Request Sent Date [Records]: The date the examiner's reports from the examination were requested.
- Expected Date [Records]: The date the examiner's reports from the examination are expected to arrive.
- Received Date [Records]: The date the examiner's reports from the examination were received.
- Comments: Any comments about the examination.

Injuries - Prior

The Prior Injuries page allows you to view and record the details of injuries suffered by plaintiffs, and of the treatment of those injuries, where the injuries are prior and unrelated to the inciting incident of the case. This page may be useful for recording injuries that resulted in the partial impairment of the plaintiff, since they will be relevant for determining the amount of impairment associated with the case incident; or for recording injuries that may be cited by the defense as alternative causes of conditions asserted by your firm as having resulted from the case incident.

| Add Prior/Subsequent Injuries | | Prior/Subsequent Injuries | | | | | | | Export |
|-------------------------------|-------------|---------------------------|-------------------|--------------|-----------|-------------|-----------------|---------|--------|
| Plaintiff | Injury | Date of Injury | Date of Diagnosis | Case Related | Firm Case | Case Number | Description | Actions | |
| Robinson, Terry-Ann L. | head injury | 5/22/2010 | 5/22/2010 | Yes | Yes | 5015350 | test | | |
| Robinson, A. Seth | SHOULDER | 2/12/2013 | 2/12/2013 | No | No | | TESTING TESTING | | |

| Add Prior Injury Providers | | Prior Injury Providers | | | | | | | Export |
|----------------------------|--|------------------------|--------------------|------------------|----------|------------|------|---------|--------|
| Plaintiff | Provider | Treatment Start Date | Treatment End Date | Number of Visits | Impair % | Total Bill | Docs | Actions | |
| Robinson, Terry-Ann L. | Dioperty, Marlene | 11/6/2017 | 12/1/2017 | | 1.00% | \$95.00 | 0 | | |
| Jana, Marie (D) | Alliance Physical Therapy (845) 566-3534 | 12/12/2016 | 2/13/2017 | | | | 2 | | |

1. Add Prior/Subsequent Injuries button. Used to add a new non-case injury to the case file. See [Adding a Non-Case Injury](#).
2. Prior/Subsequent Injuries table. Contains the details of non-case injuries and allows various actions to be performed on them. See [Prior /Subsequent Injuries Table](#).
3. Add Prior Injury Provider button. Used to add a new non-case medical provider to the case file. See [Adding a Non-Case Medical Provider](#).
4. Prior Injury Providers table. Contains the details of non-case medical providers and allows various actions to be performed on them. See [Prior Injury Providers Table](#).

Prior/Subsequent Injuries Table

The Prior/Subsequent Injuries table is where the details of non-case injuries are stored. Each row of the table represents an individual injury. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Prior/Subsequent Injuries table contains the following available columns:

| Add Prior/Subsequent Injuries | | Prior/Subsequent Injuries | | | | | | | Export |
|-------------------------------|-------------|---------------------------|-------------------|--------------|-----------|-------------|-----------------|----------|---------|
| Plaintiff | Injury | Date of Injury | Date of Diagnosis | Case Related | Firm Case | Case Number | Description | Comments | Actions |
| Robinson, Terry-Ann L. | head injury | 5/22/2010 | 5/22/2010 | Yes | Yes | 5015350 | test | TEST | |
| Robinson, A. Seth | SHOULDER | 2/12/2013 | 2/12/2013 | No | No | | TESTING TESTING | | |

1. Plaintiff: The plaintiff who suffered the prior injury.
2. Injury: The prior injury suffered by the plaintiff.
3. Date of Injury: The date the prior injury occurred.
4. Date of Diagnosis: The date the prior injury was diagnosed.
5. Case Related: Whether there is a separate lawsuit associated with the prior injury.
6. Firm Case: Whether the lawsuit associated with the prior injury is also being handled by your firm.
7. Case Number: The case number of the lawsuit associated with the prior injury.
8. Description: A description of the circumstances of the prior injury.
9. Actions: A Right-click icon; the right-click menu contains Edit and Delete.
10. Comments: Any comments about the prior injury.

Editing a Non-Case Injury

To edit a non-case injury:

1. Click the [right-click icon](#) in the Actions column of the row representing the injury you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for non-case injuries, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Prior Injury Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Non-Case Injury

To delete a non-case injury:

1. Click the [right-click icon](#) in the Actions column of the row representing the injury you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the injury, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Non-Case Injury

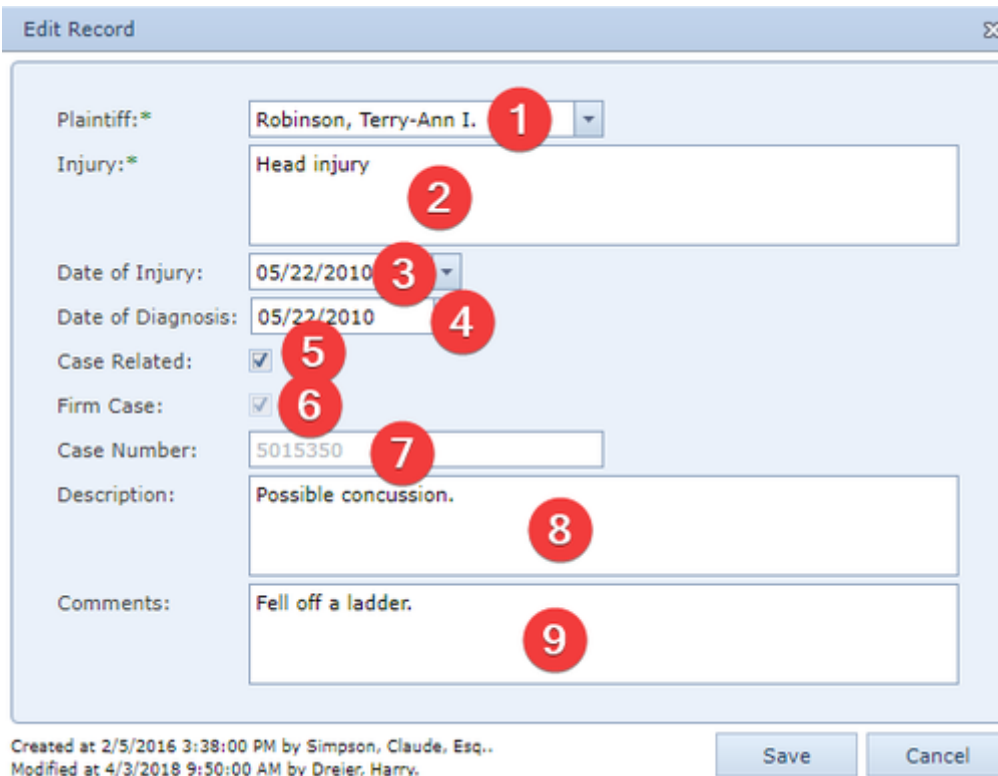
To add a new non-case injury:

1. Click the Add Prior/Subsequent Injury button. This will bring up an Add/Edit panel for non-case injuries, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Prior Injury Panel](#) for details about the fields.
3. Click Save to save the injury and close the panel.

- If you decide you do not wish to save the injury, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Prior Injury Panel

The Add/Edit Prior Injury Panel allows you to fill in the details of a non-case injury. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Plaintiff: The plaintiff who suffered the injury.
2. Injury: The injury suffered by the plaintiff.
3. Date of Injury: The date the injury occurred.
4. Date of Diagnosis: The date the injury was diagnosed.
5. Case Related: Whether there is a separate lawsuit associated with the injury.
6. Firm Case: Whether the lawsuit associated with the injury is also being handled by your firm or not. This field is uneditable, and is treated as if it were unchecked, if Case Related is unchecked.
7. Case Number: The case number of the lawsuit associated with the injury. This field is uneditable if Case Related is unchecked.
8. Description: A description of the circumstances of the injury.
9. Comments: Any comments about the injury.

Prior Injury Providers Table

The Prior Injury Providers table is where the details of non-case medical providers are stored. Each row of the table represents an individual provider. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Prior Injury Providers table contains the following available columns:

| Add Prior Injury Providers | | | | | | | | | |
|----------------------------|--|----------------------|----------|--------------------|------------------|----------|------------|------|---------|
| Prior Injury Providers | | | | | | | | | |
| Plaintiff | Provider | Treatment Start Date | Comments | Treatment End Date | Number of Visits | Impair % | Total Bill | Docs | Actions |
| Robinson, Terry-Ann I. | Diagnarty, Marlene | 11/6/2017 | | 12/1/2017 | | 1.00% | \$95.00 | 0 | |
| Jane, Marie (D) | Alliance Physical Therapy (845) 366-3214 | 12/12/2016 | | 2/13/2017 | | | | 2 | |

1. Plaintiff: The plaintiff who was treated by the provider.
2. Provider: The medical provider who treated the plaintiff.
3. Treatment Start Date: The date the provider began treating the plaintiff.
4. Treatment End Date: The date the provider stopped treating the plaintiff.
5. Number of Visits: The number of visits to the provider.
6. Impair %: The assessed impairment rating resulting from the injury, after treatment.
7. Total Bill: The total of all bills related to visits with the provider.
8. Docs: The number of documents associated with the medical provider and a link to the documents in the [Documents](#) case page.
9. Actions: A Right-click icon; the right-click menu contains Edit and Delete.
10. Comments: Any comments about the provider.

Editing a Non-Case Medical Provider

To edit a non-case medical provider:

1. Click the [right-click icon](#) in the Actions column of the row representing the provider you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for non-case medical providers, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Prior Provider Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Non-Case Medical Provider

To delete a non-case medical provider:

1. Click the [right-click icon](#) in the Actions column of the row representing the provider you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the provider, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Non-Case Medical Provider

To add a new non-case medical provider:

1. Click the Add Provider button. This will bring up an Add/Edit panel for non-case medical providers, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Prior Provider Panel](#) for details about the fields.
3. Click Save to save the provider and close the panel.
 - If you decide you do not wish to save the provider, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Prior Provider Panel

The Add/Edit Prior Provider Panel allows you to fill in the details of a non-case medical provider. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Created at 11/28/2017 8:19:00 AM by Admin, A.
Modified at 12/1/2017 1:31:00 PM by Dreier, Harry.

1. Plaintiff: The plaintiff who was treated by the provider.
2. Provider: The medical provider who treated the plaintiff.
3. Treatment Start Date: The date the provider began treating the plaintiff.
4. Impair %: The assessed impairment rating resulting from the injury, after treatment.
5. Treatment End Date: The date the provider stopped treating the plaintiff.
6. Total Bill: The total of all bills related to visits with the provider.
7. Number of Visits: The number of visits to the provider.
8. Comments: Any comments about the provider.

Medical Providers - Prior

The Medical Providers-Prior page allows you to view and record the details of medical providers who treated plaintiffs for injuries prior and unrelated to the inciting incident of the case. The structure and function of this page is exactly identical to that of the [Medical Providers](#) page.

Employment

The Employment page allows you to view and record plaintiffs' employment details, in particular wages lost and compensated for in connection with the case incident, and to view and record the basic details of plaintiffs' tax returns.

The Structure of This Page

Note: The Add Lost Wages button, Lost Wages table, Add Amount Paid button, and Amount Paid table are all associated with an individual row of the Employers table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Employment page, and where in the Employers table they appear, will depend on which row, if any, of the Employer table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot displays the 'Employer' table with the following subtables and highlighted elements:

- 1:** Add Employment Details button.
- 2:** Employers table header and first row.
- 3:** Add Lost Wages button.
- 4:** Lost Wages table header.
- 5:** Add Amount Paid button.
- 6:** Amount Paid table header.
- 7:** Add Tax Returns button.
- 8:** Tax Returns table header and first row.

1. Add Employment Details button: Used to add a new employer to the case file. See [Adding an Employer](#).
2. Employers table: Contains the employment details and allows various actions to be performed on them. See [Employers Table](#).
3. Add Lost Wages button: Used to add lost wages to the case file. See [Adding Lost Wages](#).
4. Lost Wages table: Contains the details of lost wages from a particular employer and allows various actions to be performed on them. See [Lost Wages Table](#).
5. Add Amount Paid button: Used to add a payment of a claim for lost wages to the case file. See [Adding a Payment for Lost Wages](#).
6. Amount Paid table: Contains the payment details of claims for lost wages from a particular employer and allows various actions to be performed on them. See [Amount Paid Table](#).
7. Add Tax Returns button: Used to add a tax return to the case file. See [Adding a Tax Return](#).
8. Tax Returns table: Contains the basic details of tax returns and allows various actions to be performed on them. See [Tax Returns Table](#).

Employer Table

The Employer table is where plaintiffs' employment details are stored. Each row of the table represents an individual employer. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Employers table contains the following available columns:

The screenshot shows the 'Employer' table with columns numbered 1 through 14:

- 1: Plus sign icon (+)
- 2: Plaintiff Name
- 3: Employer Name
- 4: Contact Person Name
- 5: Job Title
- 6: On the Job Injury?
- 7: W/C Claim
- 8: Date Hired
- 9: Salary
- 10: Commission
- 11: Bonus
- 12: OverTime
- 13: Other Compensation
- 14: Action

1. [column with no title]: A plus sign **+** in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Lost Wages and Amount Paid). Clicking on the plus sign **+** opens the Lost Wages and Amount Paid subtables for that employer. The plus sign then turns into a negative sign **-** which, when clicked, closes the subtable.
2. Plaintiff Name: The plaintiff employed by the employer.
3. Employer Name: The employer that employed the plaintiff.
4. Contact Person Name: The representative of the employer with whom your firm corresponds.
5. Job Title: The plaintiff's title during this employment.
6. On the Job Injury?: Whether the injury that incited the case occurred during this employment.
7. W/C Claim: Whether a workers' compensation claim has been filed in connection with the on-the-job injury.
8. Date Hired: The date the plaintiff was hired by the employer.
9. Salary: The amount of the salary earned by the plaintiff during this employment (periodically, not total).
10. Commission: The amount earned by the plaintiff in commissions during this employment (periodically on average, not total).
11. Bonus: The amount of the bonuses earned by the plaintiff during this employment (periodically on average, not total).
12. OverTime: The amount of overtime pay earned by the plaintiff during this employment (periodically on average, not total).
13. Other Compensation: The amount earned by the plaintiff in compensation not otherwise categorized during this employment.
14. Action: A right-click icon; the right-click menu contains Edit and Delete.

The following additional columns are available for this table. Click on Show/Hide Columns to change the columns shown in this table.

1. Actions: An [Edit icon](#) and a [Delete icon](#).

2. Auth. to Defense Counsel: Whether a signed authorization to release the employer's records of the plaintiff has been sent to the defense counsel.
3. Auth. to Defense Counsel Date: The date a signed authorization to release the employer's records of the plaintiff was sent to the defense counsel.
4. Average Weekly Wage (AWW): The plaintiff's average weekly wage (calculated in accordance with state labor law).
5. Compensation Comments: Any comments about the compensation earned during this employment.
6. Continuing?: Whether the plaintiff continues to be employed by the employer.
7. Employer Address: The street address of the employer.
8. Employer Comments: Any comments about the employer.
9. Temporary Total Disability (TDD): The weekly amount of the plaintiff's temporary total disability payments.
10. Union: The union the plaintiff belonged to during this employment.
11. Works Off the Books: Whether the plaintiff's employment and payment are unreported and untaxed.
12. Works Partially Off the Books: Whether the plaintiff's employment and payment are underreported and undertaxed.

Editing an Employer

To edit an employer:

1. Click the [right-click icon](#) in the Action column of the row representing the employer you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the employer you wish to edit. This will bring up an Add/Edit panel for employers, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for employers, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Employment Details Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Employer

To delete an employer:

1. Click the [right-click icon](#) in the Action column of the row representing the employer you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the employer you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the employer, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Employer

To add a new employer:

1. Click the Add Employment Details button. This will bring up an Add/Edit panel for employers, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Employment Details Panel](#) for details about the fields.
3. Click Update to save the employer and close the panel.
 - If you decide you do not wish to save the employer, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Employment Details Panel

The Add/Edit Employment Details Panel allows you to fill in the details of an employer. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Add/Edit Employment Details

Plaintiff Name:* 1. Lehmyer, John A. Date Hired: 2. 07/08/2014

Employer Name:* 3. Radi Architectural Designs, 126 Architectural Way, Fort Lauderdale, FL 33304

Contact Person Name: 4. Designs, Inc. Job Title: 5. Team Leader

Union: 6. International Brotherhood of Electrical Workers, Local 25

On the Job Injury?: 7. W/C Claim: 8.

Employer Comments: 9.

Salary: 10. \$10,000.00 per: 11. Monthly

Commission: 12. per: 13. Annually

Bonus: 14. \$10,000.00 per: 15. Annually

OverTime: 16. per: 17.

Other Compensation: 18. per: 19.

Temporary Total Disability (TDD): 20.

Average Weekly Wage (AWW): 21.

Compensation Comments: 22.

Continuing?: 23. Works Off the Books: 24.

Works Partially Off the Books: 25. Auth. to Defense Counsel: 26.

Auth. to Defense Counsel Date: 27.

Created at 7/20/2017 1:53:00 PM by Simpson, Claude, Esq.
Modified at 4/3/2018 11:23:00 AM by Dreier, Harry.

Save Cancel

1. Plaintiff Name: The plaintiff employed by the employer.
2. Date Hired: The date the plaintiff was hired by the employer.
3. Employer Name: The employer that employed the plaintiff.
4. Contact Person Name: The representative of the employer with whom your firm corresponds.
5. Job Title: The plaintiff's title during this employment.
6. Union: The union the plaintiff belonged to during this employment.
7. On the Job Injury?: Whether the injury that incited the case occurred during this employment.
8. W/C Claim: Whether a workers' compensation claim has been filed in connection with the on-the-job injury.
9. Employer Comments: Any comments about the employer.
10. Salary: The amount of the salary earned by the plaintiff during this employment (periodically, not total).
11. per [Salary]: The length of time used to calculate the plaintiff's periodic salary.
12. Commission: The amount earned by the plaintiff in commissions during this employment (periodically on average, not total).
13. per [Commission]: The length of time used to calculate the plaintiff's periodic commissions.
14. Bonus: The amount of the bonuses earned by the plaintiff during this employment (periodically on average, not total).
15. per [Bonus]: The length of time used to calculate the plaintiff's periodic bonuses.
16. OverTime: The amount of overtime pay earned by the plaintiff during this employment (periodically on average, not total).
17. per [OverTime]: The length of time used to calculate the plaintiff's periodic overtime pay.
18. Other Compensation: The amount earned by the plaintiff in compensation not otherwise categorized during this employment (periodically on average, not total).
19. per [Other Compensation]: The length of time used to calculate the plaintiff's periodic compensation not otherwise categorized.
20. Temporary Total Disability (TDD): The weekly amount of the plaintiff's temporary total disability payments.
21. Average Weekly Wage (AWW): The plaintiff's average weekly wage (calculated in accordance with state labor law).
22. Compensation Comments: Any comments about the compensation earned during this employment.
23. Continuing?: Whether the plaintiff continues to be employed by the employer.
24. Works Off the Books: Whether the plaintiff's employment and payment are unreported and untaxed.
25. Works Partially Off the Books: Whether the plaintiff's employment and payment are underreported and undertaxed.
26. Auth. to Defense Counsel: Whether a signed authorization to release the employer's records of the plaintiff has been sent to the defense counsel.
27. Auth. to Defense Counsel Date: The date a signed authorization to release the employer's records of the plaintiff was sent to the defense counsel. This field is uneditable unless Auth. to Defense Counsel is selected.

Lost Wages Table

The Lost Wages table is where the details of lost wages are stored. The Lost Wages table is a subtable of the [Employers Table](#), which means that each row of the Employers table has an individual Lost Wages table associated with it, which is specific to the employer in that row; open a row of the Employers table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Lost Wages table. Each row of the table represents an individual amount lost. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Lost Wages table contains the following available columns:

| From Date | To Date | Type | MD Confirmation Requested | MD Confirmation Received | Employer Verified Requested | Balance | Employer Verified Received | Less | Amount Paid | Action |
|-----------|---------|------|---------------------------|--------------------------|-----------------------------|---------|----------------------------|------|-------------|--------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |

1. From Date: The start date of the period during which wages were lost.

2. To Date: The end date of the period during which wages were lost.
3. Type: The type of earnings lost.
4. MD Confirmation Requested: The date on which a doctor's confirmation that the injuries caused the inability to earn the wages was requested.
5. MD Confirmation Received: The date on which a doctor's confirmation that the injuries caused the inability to earn the wages was received.
6. Employer Verif/n Requested: The date on which the employer's verification that the wages were not earned was requested.
7. Employer Verif/n Received: The date on which the employer's verification that the wages were not earned was received.
8. Loss: The amount of the wages lost.
9. Action: A Right-click icon; the right-click menu contains Edit and Delete.
10. Amount: The amount of the wages lost that have not been compensated for; automatically calculated.
11. Amount Paid: The total amount of compensation for the wages lost.

Editing Lost Wages

To edit lost wages:

1. Click the [right-click icon](#) in the Action column of the row representing the lost wages you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the lost wages you wish to edit. This will bring up an Add/Edit panel for lost wages, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for lost wages, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Lost Wages Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Lost Wages

To delete lost wages:

1. Click the [right-click icon](#) in the Action column of the row representing the lost wages you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the lost wages you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the lost wages, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Lost Wages

To add new lost wages:

1. Click the Add Lost Wages button. This will bring up an Add/Edit panel for lost wages, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Lost Wages Panel](#) for details about the fields.
3. Click Update to save the lost wages and close the panel.
 - If you decide you do not wish to save the lost wages, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Lost Wages Panel

The Add/Edit Lost Wages Panel allows you to fill in the details of lost wages. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows a window titled "Add/Edit Lost Wages" with a close button (X) in the top right corner. The panel contains several input fields arranged in two columns. Red circles with numbers 1 through 8 are overlaid on the form to identify specific fields:

- 1: Type (dropdown menu, currently set to "Salary")
- 2: From Date (calendar icon, currently set to "04/04/2017")
- 3: To Date (calendar icon, currently set to "06/14/2017")
- 4: MD Confirmation Requested (calendar icon, currently set to "11/06/2017")
- 5: MD Confirmation Received (calendar icon, currently set to "12/21/2017")
- 6: Employer Verif/n Requested (calendar icon, currently set to "11/06/2017")
- 7: Employer Verif/n Received (calendar icon, currently set to "01/22/2018")
- 8: Loss (text input field, currently set to "\$6,852.00")

At the bottom of the panel, there are two buttons: "Save" and "Cancel".

1. Type: The type of earnings lost.
2. From Date: The start date of the period during which wages were lost.
3. To Date: The end date of the period during which wages were lost.
4. MD Confirmation Requested: The date on which a doctor's confirmation that the injuries caused the inability to earn the wages was requested.
5. MD Confirmation Received: The date on which a doctor's confirmation that the injuries caused the inability to earn the wages was requested.
6. Employer Verif/n Requested: The date on which the employer's verification that the wages were not earned was requested.
7. Employer Verif/n Received: The date on which the employer's verification that the wages were not earned was requested.
8. Loss: The amount of the wages lost.

Amount Paid Table

The Amount Paid table is where the payment details of claims for lost wages are stored. The Amount Paid table is a subtable of the [Employers Table](#), which means that each row of the Employers table has an individual Amount Paid table associated with it, which is specific to the employer in that row; open a row of the Employers table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Amount Paid table. Each row of the table represents an individual payment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Amount Paid table contains the following available columns:

| Associated Lost Wages | Claim Submitted Date | Paid Date | Paid By | Collateral | Paid Amount | Action |
|-----------------------|----------------------|-----------|-------------------------------------|----------------------|-------------|--------|
| \$14,200.00 | 7/3/2017 | 7/3/2017 | Ohio Bureau of Workers Compensation | Workers Compensation | \$3,200.00 | |

1. Associated Lost Wages: Which amount of lost wages from the employer the payment is for.
2. Claim Submitted Date: The date the claim was made to the insurer regarding the lost wages.
3. Paid Date: The date the payment was made.
4. Paid By: The contact that made the payment.
5. Collateral: The type of compensation being paid.
6. Paid Amount: The amount being paid.
7. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Payment for Lost Wages

To edit a payment for lost wages:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the payment you wish to edit. This will bring up an Add/Edit panel for payments for lost wages, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for payments for lost wages, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Lost Wage Payment Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Payment for Lost Wages

To delete a payment for lost wages:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the payment you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the payment, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Payment for Lost Wages

To add a new payment for lost wages:

1. Click the Add Amount Paid button. This will bring up an Add/Edit panel for payments for lost wages, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Lost Wage Payment Panel](#) for details about the fields.
3. Click Update to save the payment and close the panel.
 - If you decide you do not wish to save the payment, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Lost Wage Payment Panel

The Add/Edit Lost Wage Payment Panel allows you to fill in the payment details of a claim for lost wages. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

1. Associated Lost Wages: Which amount of lost wages from the employer the payment is for.
2. Collateral: The type of compensation being paid.
3. Claim Submitted Date: The date the claim was made to the insurer regarding the lost wages.
4. Paid Date: The date the payment was made.
5. Paid By: The contact that made the payment.
6. Paid Amount: The amount being paid.

Tax Returns Table

The Tax Returns table is where the basic details of tax returns are stored. Each row of the table represents an individual tax return. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Tax Returns table contains the following available columns:

1. Plaintiff Name: The plaintiff who filed the tax return.
2. Year: The year of the tax return.
3. Requested From: The contact who provided the plaintiff's tax return.
4. Requested Date: The date the tax return was requested.
5. Received Date: The date the tax return was received.
6. Gross Income: The plaintiff's gross income listed on the tax return.
7. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Tax Return

To edit a tax return:

1. Click the [right-click icon](#) in the Action column of the row representing the tax return you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the tax return you wish to edit. This will bring up an Add/Edit panel for tax returns, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tax returns, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Tax Return Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Tax Return

To delete a tax return:

1. Click the [right-click icon](#) in the Action column of the row representing the tax return you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the tax return you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the tax return, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Tax Return

To add a new tax return:

1. Click the Add Tax Returns button. This will bring up an Add/Edit panel for tax returns, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Tax Return Panel](#) for details about the fields.
3. Click Update to save the tax return and close the panel.
 - If you decide you do not wish to save the tax return, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Tax Return Panel

The Add/Edit Tax Return Panel allows you to fill in the basic details of a tax return. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Plaintiff Name: The plaintiff who filed the tax return.
2. Gross Income: The plaintiff's gross income listed on the tax return.
3. Year: The year of the tax return.
4. Requested From: The contact who provided the plaintiff's tax return.
5. Requested Date: The date the tax return was requested.
6. Received Date: The date the tax return was received.

School/Other Activities

The School/Other Activities page allows you to view and record the details of plaintiffs' losses of school time and of the ability to participate in other activities in connection with the case incident.

The Structure of This Page

1. Add School button: Used to add a new loss of school time to the case file. See [Adding a Loss of School Time](#).
2. School table: Contains the details of losses of school time and allows various actions to be performed on them. See [School Table](#).
3. Add Other Activity button: Used to add a new loss of an activity to the case file. See [Adding a Loss of an Activity](#).
4. Other Activity table: Contains the details of losses of activities and allows various actions to be performed on them. See [Other Activity Table](#).

School Table

The School table is where the details of losses of school time are stored. Each row of the table represents an individual period of lost time. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The School table contains the following available columns:

1. Plaintiff Name: The plaintiff who lost time from the school.
2. School: The school the plaintiff lost time from.

3. Contact Person Name: The representative of the school with whom your firm corresponds.
4. Phone: The phone number of the school.
5. From: The start date of the period of time lost from the school.
6. To: The end date of the period of time lost from the school.
7. Grade: The grade the plaintiff was in at school during the loss of time.
8. Limited?: Whether the damages that can be recovered for the loss of school time are limited by statute.
9. School Verif. Requested Date: The date on which the school's verification that the plaintiff lost the school time was requested.
10. School Verif. Received Date: The date on which the school's verification that the plaintiff lost the school time was received.
11. Lost Amount: The asserted dollar value of the time lost from school.
12. Auth. to Defense Counsel: Whether a signed authorization to release the school's records of the plaintiff has been sent to the defense counsel.
13. Auth. to Defense Counsel Date: The date a signed authorization to release the school's records of the plaintiff was sent to the defense counsel.
14. Comments: Any comments about the loss of school time.
15. Days: The number of days in the period of time lost from the school.
16. MD Conf. Date: The date on which a doctor's confirmation that the injuries caused the inability to attend school was received.
17. MD Conf. Req. Date: The date on which a doctor's confirmation that the injuries caused the inability to attend school was requested.
18. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Loss of School Time

To edit a loss of school time:

1. Click the [right-click icon](#) in the Action column of the row representing the loss of school time you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the loss of school time you wish to edit. This will bring up an Add/Edit panel for losses of school time, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for losses of school time, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit School Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Loss of School Time

To delete a loss of school time:

1. Click the [right-click icon](#) in the Action column of the row representing the loss of school time you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the loss of school time you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the loss of school time, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Loss of School Time

To add a new loss of school time:

1. Click the Add School button. This will bring up an Add/Edit panel for losses of school time, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit School Panel](#) for details about the fields.
3. Click Update to save the loss of school time and close the panel.
 - If you decide you do not wish to save the loss of school time, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit School Panel

The Add/Edit School Panel allows you to fill in the details of a loss of school time. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Add/Edit School

Plaintiff Name:* Marks, Rodney (I) 1 Grade: 6th Grade 2

School:* School for Language and Communication Development 3

Contact Person Name:* Scarborough, Paul 4

From: 04/17/20 5 To: 06/05/20 6

MD Conf. Req. Date: / / 7 MD Conf. Date: / / 8

School Verif. Requested Date: 9 05/2017 School Verif. Received Date: 10 07/2017

Lost Amount: 11 Limited?: 12

Comments: 13

Auth. to Defense Counsel: 14 Auth. to Defense Counsel Date: / / 15

Created at 4/3/2018 3:34:00 PM by Dreier, Harry. Update Cancel

1. Plaintiff Name: The plaintiff who lost time from the school.
2. Grade: The grade the plaintiff was in at school during the loss of time.
3. School: The school from which the plaintiff lost time.
4. Contact Person Name: The representative of the school with whom your firm corresponds.
5. From: The start date of the period of time lost from the school.
6. To: The end date of the period of time lost from the school.
7. MD Conf. Req. Date: The date on which a doctor's confirmation that the injuries caused the inability to attend school was requested.
8. MD Conf. Date: The date on which a doctor's confirmation that the injuries caused the inability to attend school was received.
9. School Verif. Requested Date: The date on which the school's verification that the plaintiff lost the school time was requested.
10. School Verif. Received Date: The date on which the school's verification that the plaintiff lost the school time was received.
11. Lost Amount: The asserted monetary value of the time lost from school.
12. Limited?: Whether the damages that can be recovered for the loss of school time are limited by statute.
13. Comments: Any comments about the loss of school time.
14. Auth. to Defense Counsel: Whether a signed authorization to release the school's records of the plaintiff has been sent to the defense counsel.
15. Auth. to Defense Counsel Date: The date a signed authorization to release the school's records of the plaintiff was sent to the defense counsel.

Other Activity Table

The Other Activity table is where the details of losses of activities other than school are stored. Each row of the table represents an individual period of lost time. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Other Activity table contains the following available columns:

| Plaintiff Name | Organization | Contact Person Name | Phone | From | To | Other Activity | Limited? | School Verif. Requested | School Verif. Received | Lost Amount | Auth. to Defense Counsel | Auth. to Defense Counsel Date | MD Conf. Date | MD Conf. Req. Date | Comments | Action |
|-------------------|-------------------------------|---------------------|----------------|-----------|-----------|----------------|--------------------------|-------------------------|------------------------|-------------|--------------------------|-------------------------------|---------------|--------------------|----------|--------|
| Robinson, A. Beth | Beaumont Green Medical Center | Demato, Frank | (278) 349-1000 | 4/17/2017 | 4/15/2018 | Beaumont | <input type="checkbox"/> | | | | <input type="checkbox"/> | | 3/3/2018 | 2/12/2018 | | |

1. Add Other Activity: Click on this button to enter a new lost time from an Other Activity.
2. Plaintiff Name: The plaintiff who lost time from the activity.
3. Organization: The organization with which the plaintiff had performed the activity.
4. Contact Person Name: The representative of the organization with whom your firm corresponds.
5. Phone: The phone number of the organization.
6. From: The start date of the period of time lost from the activity.
7. To: The end date of the period of time lost from the activity.
8. Other Activity: The activity the plaintiff lost the ability to perform.
9. Limited?: Whether the damages that can be recovered for the loss of the activity are limited by statute.
10. School Verif. Requested Date: The date on which the organization's verification that the plaintiff lost the ability to perform the activity was requested.
11. School Verif. Received Date: The date on which the organization's verification that the plaintiff lost the ability to perform the activity was received.
12. Lost Amount: The asserted monetary value of the time lost from the activity.
13. Auth. to Defense Counsel: Whether a signed authorization to release the organization's records of the plaintiff has been sent to the defense counsel.
14. Auth. to Defense Counsel Date: The date a signed authorization to release the organization's records of the plaintiff was sent to the defense counsel.
15. MD Conf. Date: The date on which a doctor's confirmation that the injuries caused the inability to perform the activity was received.
16. MD Conf. Req. Date: The date on which a doctor's confirmation that the injuries caused the inability to perform the activity was requested.
17. Comments: Any comments about the loss of the activity.
18. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Loss of an Activity

To edit a loss of an activity:

1. Click the [right-click icon](#) in the Action column of the row representing the activity you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the activity you wish to edit. This will bring up an Add/Edit panel for losses of activities, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for losses of activities, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Other Activity Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Loss of an Activity

To delete a loss of an activity:

1. Click the [right-click icon](#) in the Action column of the row representing the activity you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - a. Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the activity you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the activity, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Loss of an Activity

To add a new loss of an activity:

1. Click the Add Other Activity button. This will bring up an Add/Edit panel for losses of activities, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Other Activity Panel](#) for details about the fields.
3. Click Update to save the activity and close the panel.
 - If you decide you do not wish to save the activity, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Other Activity Panel

The Add/Edit Other Activity Panel allows you to fill in the details of a loss of an activity. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Add/Edit Other Activity' panel with the following fields and callouts:

- 1. Plaintiff Name: Robins, Seth
- 2. Other Activity: Bowling
- 3. Organization: Bowling Green Medical Center
- 4. Contact Person Name: Damato, Frank
- 5. From: 7/2017
- 6. To: 3/2018
- 7. MD Conf. Req. Date: 02/7/2018
- 8. MD Conf. Date: 03/08/18
- 9. School Verif. Requested Date: / /
- 10. School Verif. Received Date: / /
- 11. Lost Amount: (empty text box)
- 12. Limited?: (checkbox)
- 13. Comments: (empty text area)
- 14. Auth. to Defense Counsel: (checkbox)
- 15. Auth. to Defense Counsel Date: / /

Created at 4/3/2018 4:03:00 PM by Dreier, Harry. [Update] [Cancel]

1. Plaintiff Name: The plaintiff who lost time from the activity.
2. Other Activity: The activity the plaintiff lost the ability to perform.
3. Organization: The organization with which the plaintiff had performed the activity.
4. Contact Person Name: The representative of the organization with whom your firm corresponds.
5. From: The start date of the period of time lost from the activity.
6. To: The end date of the period of time lost from the activity.
7. MD Conf. Req. Date: The date on which a doctor's confirmation that the injuries caused the inability to perform the activity was requested.
8. MD Conf. Date: The date on which a doctor's confirmation that the injuries caused the inability to perform the activity was received.
9. School Verif. Requested Date: The date on which the organization's verification that the plaintiff lost the ability to perform the activity was requested.
10. School Verif. Received Date: The date on which the organization's verification that the plaintiff lost the ability to perform the activity was received.
11. Lost Amount: The asserted monetary value of the time lost from the activity.
12. Limited?: Whether the damages that can be recovered for the loss of the activity are limited by statute.
13. Comments: Any comments about the loss of the activity.

14. Auth. to Defense Counsel: Whether a signed authorization to release the organization's records of the plaintiff has been sent to the defense counsel.
15. Auth. to Defense Counsel Date: The date a signed authorization to release the organization's records of the plaintiff was sent to the defense counsel.

Special Damages

The Special Damages page allows you to view and record the details of special damages in the case. Special Damages recorded in SmartAdvocate include vehicle damage, lost wages, and bills from medical and other providers, and when those damages are recorded on the appropriate pages (respectively, the [Plaintiff Vehicles](#), [Employment](#), [Medical Providers](#), and [Other Providers](#) pages), they will automatically also appear on this page. However, on this page, you can also manually add and edit special damages that are not in any of those categories.

The Structure of This Page

1. Summary table: Displays the totals of various quantities across all special damages for each plaintiff. See [Summary Table](#).
2. Add Special Damage button: Used to add new special damages to the case file. See [Adding Special Damages](#).
3. Special Damage table: Contains the details of special damages and allows various actions to be performed on them. See [Special Damage Table](#).
4. Add Amount Paid button: Used to add a new payment of special damages to the case file. See [Adding a Payment for Special Damages](#).
5. Amount Paid table: Contains the details of payments of special damages and allows various actions to be performed on them. See [Amount Paid Table](#).

Summary Table

The Summary table summarizes the information in the Special Damage tables. It is updated automatically when changes are made to the Special Damage or Amount Paid tables; no changes may be made to the Summary table directly. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Summary table contains the following columns:

1. Plaintiffs: The plaintiff whose special damages totals are listed. Each plaintiff in the case with at least one associated row in the Special Damage table is automatically listed in one row in this table.
2. Bill Amount: The total of the initial amounts of all the special damages for the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.
3. Negotiated Bill Amount: The total of the amounts of all the special damages for the plaintiff after negotiation and/or other discounting. The sum of this column across all rows in the table appears below the last row of the column.
4. Amount Paid: The total of the amounts paid toward all the special damages for the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.
5. Balance: The total amount of uncompensated special damages for the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.

Special Damage Table

The Special Damage table is where the details of special damages are stored. Each row of the table represents an individual expense or other loss reflecting special damages. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Special Damage table contains the following available columns:

| Plaintiff | Provider | Type | Sub-Type | Bill # | Account # | Loss | Negotiated Bill Amount | Amount Paid | Submitted Date | From Date | To Date | Balance | Comments | Action |
|------------------------|--|------------------|--------------------|--------|-----------|----------|------------------------|-------------|----------------|-----------|----------|----------|----------|--------|
| Ginghames, John A. | Radical Architectural Designs | Lost Wages | Salary | 62245 | 67890 | \$800.00 | \$450.00 | \$450.00 | 10/2/2017 | 8/1/2017 | 8/1/2017 | \$47.00 | | |
| Ginghames, Emeryne (D) | Richmond County Ambulance | Other Provider | Ambulance Services | | | \$800.00 | | \$800.00 | | | | \$0.00 | | |
| Ginghames, John A. | Roosevelt Hospital Division - Medical Records Dept | Medical Provider | Hospital Admission | | | \$820.00 | | \$0.00 | | | | \$820.00 | | |

1. Add Special Damage button: Used to add new special damages to the case file.
2. [column with no title]: A plus sign (+) in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Amount Paid for that Special Damage). Clicking on the plus sign opens the Amount Paid subtable for that Special Damage. The plus sign then turns into a negative sign (-) which, when clicked, closes the subtable.
3. Plaintiff: The plaintiff who suffered the damages.
4. Provider: The service provider whose bill represents special damages, or the employer from which the plaintiff suffered lost wages.
5. Type: The broad category of the damages.
6. Sub-Type: The sub-type of the damages within the broader category.
7. Bill #: The identification number of the bill.
8. Account #: The identification number of the account of which the bill is part.
9. Loss: The initial amount of the damages. The sum of this column across all rows in the table appears below the last row of the column.
10. Negotiated Bill Amount: The amount of the damages after negotiation and/or other discounting. The sum of this column across all rows in the table appears below the last row of the column.
11. Amount Paid: The total amount paid toward the damages. The sum of this column across all rows in the table appears below the last row of the column.
12. Submitted Date: The date the bill representing the damages was issued.
13. From Date: The start date of the period associated with the damages.
14. To Date: The end date of the period associated with the damages.
15. Balance: The amount of the damages remaining uncompensated. The sum of this column across all rows in the table appears below the last row of the column.
16. Comments: Any comments about the damages.
17. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing Special Damages

To edit special damages:

1. Click the [right-click icon](#) in the Action column of the row representing the damages you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for special damages, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Special Damages Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Special Damages

To delete special damages:

1. Click the [right-click icon](#) in the Action column of the row representing the damages you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the damages, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

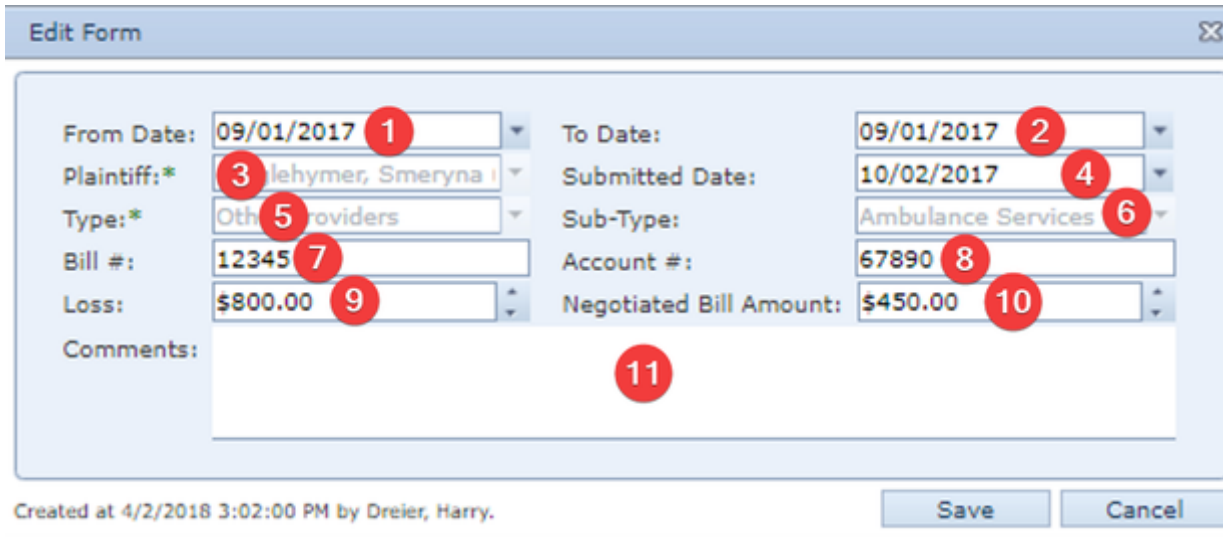
Adding Special Damages

To add new special damages:

1. Click the Add Special Damage button. This will bring up an Add/Edit panel for special damages, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Special Damages Panel](#) for details about the fields.
3. Click Save to save the damages and close the panel.
 - If you decide you do not wish to save the damages, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Special Damages Panel

The Add/Edit Special Damages Panel allows you to fill in the details of special damages. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



From Date: 09/01/2017 1 To Date: 09/01/2017 2

Plaintiff:* 3 Lehmyer, Smeryna I Submitted Date: 10/02/2017 4

Type:* 5 Oth Providers Sub-Type: Ambulance Services 6

Bill #: 12345 7 Account #: 67890 8

Loss: \$800.00 9 Negotiated Bill Amount: \$450.00 10

Comments: 11

Created at 4/2/2018 3:02:00 PM by Dreier, Harry. Save Cancel

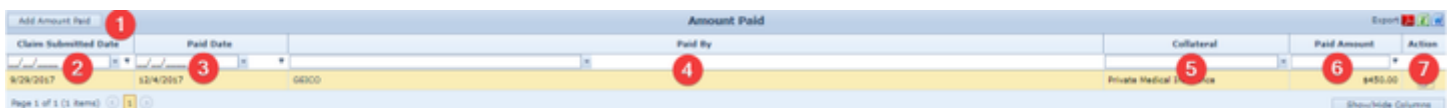
1. From Date: The start date of the period associated with the damages.
2. To Date: The end date of the period associated with the damages.
3. Plaintiff: The plaintiff who suffered the damages. This field is uneditable if the special damages were automatically added from a different page in SmartAdvocate.
4. Submitted Date: The date the bill representing the damages was issued.
5. Type: The broad category of the damages. This field is uneditable if the special damages were automatically added from a different page in SmartAdvocate.
6. Sub-Type: The type of the damages within the broader category. This field is uneditable if the special damages were automatically added from a different page in SmartAdvocate.
7. Bill #: The identification number of the bill.
8. Account #: The identification number of the account of which the bill is part.
9. Loss: The initial amount of the damages.
10. Negotiated Bill Amount: The amount of the damages after negotiation and/or other discounting.
11. Comments: Any comments about the special damages.

Amount Paid Table

The Amount Paid table is where the details of payments toward losses or bills that represent special damages are stored. The Amount Paid table is a subtable of the [Special Damage Table](#), which means that each row of the Special Damage table has an individual Amount Paid table associated with it, which is specific to the damages in that row; open a row of the Special Damage table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Amount Paid table. Each row of the table represents an individual payment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Amount Paid table contains the following available columns:



| Claim Submitted Date | Paid Date | Paid By | Collateral | Paid Amount | Action |
|----------------------|-----------|---------|-------------------------|-------------|--------|
| 9/28/2017 | 12/4/2017 | GRICO | Private Medical Expense | \$450.00 | |

1. Add Amount Paid button: Used to add new special Amounts Paid to the case file.
2. Claim Submitted Date: The date the claim was made to the insurer regarding the damages.
3. Paid Date: The date the payment was made.
4. Paid By: The contact that made the payment.
5. Collateral: The type of compensation being used to pay for the damages.
6. Paid Amount: The amount being paid.
7. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Payment for Special Damages

To edit a payment for special damages:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for payments for special damages, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Amount Paid Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Payment for Special Damages

To delete a payment for special damages:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the payment, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Payment for Special Damages

To add a new payment for special damages:

1. Click the Add Amount Paid button. This will bring up an Add/Edit panel for payments for special damages, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Amount Paid Panel](#) for details about the fields.
3. Click Save to save the payment and close the panel.
 - If you decide you do not wish to save the payment, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Amount Paid Panel

The Add/Edit Amount Paid Panel allows you to fill in the details of a payment of a claim for a loss or bill that represents special damages. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

1. Claim Submitted Date: The date the claim was made to the insurer regarding the damages.
2. Collateral: The type of compensation being used to pay for the damages.
3. Paid Date: The date the payment was made.
4. Paid By: The contact that made the payment.
5. Paid Amount: The amount being paid.

Vehicles

The Plaintiff Vehicles page allows you to view and record the details of plaintiffs' vehicles that are relevant to the case, and to keep track of damage to the vehicles and compensation for the damage.

The Structure of This Page

Note: The Add New Vehicle Damage button, Vehicle Damage table, Add Amount Paid button, and Amount Paid table are all associated with an individual row of the Vehicles table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Plaintiff Vehicles page, and where in the Vehicles table they appear, will depend on which row, if any, of the Vehicles table is set to display subtables. See [Subtables and the Open/Closed Column](#).

1. Add Vehicle button: Used to add a new vehicle to the case file. See [Adding a Vehicle](#).
2. Vehicles table: Contains the vehicle details and allows various actions to be performed on them. See [Vehicles Table](#).

3. Add New Vehicle Damage button: Used to add vehicle damage to the case file. See [Adding a Vehicle Damage Expense](#).
4. Vehicle Damage table: Contains the vehicle damage details and allows various actions to be performed on them. See [Vehicle Damage Table](#).
5. Add Amount Paid button: Used to add a payment of a claim for vehicle damage to the case file. See [Adding a Payment for Vehicle Damage](#).
6. Amount Paid table: Contains the payment details of claims for vehicle damage and allows various actions to be performed on them. See [Amount Paid Table](#).



Vehicles Table

The Vehicles table is where the details of vehicles are stored. Each row of the table represents an individual vehicle. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Vehicles table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|-------------|---|---|--------------------------|------------------|---------------------|---------------------|------------------------------|---|---------------------------|----------|----|----|
| Add Vehicle | Plaintiff | Parties | License Info | Operator | Registrant | Owner | Vehicle Info | Vehicle Registration | Search History (Received) | Comments | | |
| | Operator: Singhayman, John Owner: Singhayman, John A. Registrant: Singhayman, John A. | Operator: Singhayman, John Owner: Singhayman, John A. Registrant: Singhayman, John A. | License: AB State: NY | Singhayman, John | Singhayman, John A. | Singhayman, John A. | 2018 Blue Buick LaBore Buick | State: AB0-123 Plate Type: Passenger Vehicle | | | | |

1. Add Vehicle button: Used to add new Plaintiff Vehicles to the case file.
2. [column with no title]: A plus sign  in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Vehicle Damage and Amount Paid). Clicking on the plus sign opens the Vehicle Damage and Amount Paid subtables for that vehicle. The plus sign then turns into a negative sign  which, when clicked, closes the subtable.
3. Plaintiff: The plaintiff connected to the vehicle.
4. Parties: The operator, owner, and registrant of the vehicle.
5. License Info: The operator's driver's license information (the license number, the license state, the expiration date of the license, and any restrictions on the license).
6. Vehicle Info: The physical details of the vehicle (the model year, color, make, model, and body type).
7. Vehicle Registration: The legal details of the vehicle (the license plate number and type, the VIN, and the registration expiration date).
8. Search History (Received): The dates that various documents searched for in connection with the vehicle were received.
9. Comments: Any comments about the vehicle.
10. Action: A Right-click icon; the right-click menu contains Edit and Delete.
11. Operator: The operator of the vehicle at the time of the incident.
12. Owner: The owner of the vehicle.
13. Registrant: The contact to whom the vehicle is registered.

Editing a Vehicle

To edit a vehicle:

1. Click the [right-click icon](#) in the Action column of the row representing the vehicle you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the vehicle you wish to edit. This will bring up an Add/Edit panel for vehicles, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for vehicles, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Vehicle Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Vehicle

To delete a vehicle:

1. Click the [right-click icon](#) in the Action column of the row representing the vehicle you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the vehicle you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the vehicle, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Vehicle

To add a new vehicle:

1. Click the Add Vehicle button. This will bring up an Add/Edit panel for vehicles, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Vehicle Panel](#) for details about the fields.
3. Click Save to save the vehicle and close the panel.
 - If you decide you do not wish to save the vehicle, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Vehicle Panel

The Add/Edit Vehicle Panel allows you to fill in the details of a vehicle. The information in this panel is divided into three tabs: Owner/Vehicle Info, Vehicle Damage, and Search History. The headings of the tabs are always visible in the upper left of the panel, but only one tab's contents are visible at a time; click the heading of the tab you wish to access to bring up that tab's information. See Add/Edit Panels for general information about panel structure and usage.

The Owner/Vehicle Info tab contains the following fields:

Created at 10/20/2017 2:04:00 PM by Simpson, Claude, Esq..
Modified at 4/4/2018 12:49:00 PM by Dreier, Harry.

1. Plaintiff: The plaintiff connected to the vehicle.
2. Owner: The owner of the vehicle.
3. Pick From Case [Owner]: A list of contacts from the case from which to choose the owner of the vehicle. When the selection in this field changes, the Owner field is automatically set to the selection in this field. The selection in this field is ignored when saving changes to the panel.
4. Registrant: The registrant of the vehicle.
5. Pick From Case [Registrant]: A list of contacts from the case from which to choose the registrant of the vehicle. When the selection in this field changes, the Registrant field is automatically set to the selection in this field. The selection in this field is ignored when saving changes to the panel.
6. Operator: The operator of the vehicle.
7. Pick From Case [Operator]: A list of contacts from the case from which to choose the operator of the vehicle. When the selection in this field changes, the Operator field is automatically set to the selection in this field. The selection in this field is ignored when saving changes to the panel.
8. License #: The operator's driver's license number.
9. License state: The state that issued the operator's driver's license.
10. Restrictions: Any restrictions on the operator's driver's license.
11. Lic.Exp: The expiration date of the operator's driver's license.
12. Make: The make of the vehicle.
13. Model: The model of the vehicle.
14. Year: The model year of the vehicle.
15. Body Type: The body type of the vehicle.
16. Plate #: The license plate number of the vehicle.
17. Color: The color of the vehicle.
18. Plate Type: The type of the vehicle's license plate.
19. Vehicle State: The state in which the vehicle is registered.
20. VIN: The Vehicle Identification Number of the vehicle.
21. Reg.Exp: The expiration date of the vehicle's registration.
22. Lease: Whether the vehicle is leased.
23. Comment: Any comments about the vehicle.

The Vehicle Damage tab contains the following fields:

Created at 10/20/2017 2:04:00 PM by Simpson, Claude, Esq.
Modified at 4/4/2018 12:49:00 PM by Dreier, Harry.

1. Make Claim For P.D.: Whether your firm intends to file a claim for property damage in connection with damage done to the vehicle in the case incident.
2. Estimate Requested: The date your firm requested the estimate of the cost of repairing the vehicle damage.
3. Estimate Received: The date your firm received the estimate of the cost of repairing the vehicle damage.
4. Photos Requested: The date your firm requested photographs of the damage to the vehicle.
5. Photos Received: The date your firm received photographs of the damage to the vehicle.
6. Total Repairs? Changes to this field are ignored when saving the vehicle record. If the Value Before Accident field contains a positive number, this field is considered selected; otherwise, this field is considered deselected.
7. Value Before Accident: The value of the vehicle before the accident.

The Search History tab contains the following fields:

Created at 10/20/2017 2:04:00 PM by Simpson, Claude, Esq.
Modified at 4/4/2018 12:49:00 PM by Dreier, Harry.

1. Operator License History Search: Whether your firm has requested the operator's driving record.
2. Operator License History Requested Date: The date your firm requested the operator's driving record.
3. Operator License History Received Date: The date your firm received the operator's driving record.
4. Plate Search Search: Whether your firm has requested a search of the license plate number.
5. Plate Search Requested Date: The date your firm requested a search of the license plate number.
6. Plate Search Received Date: The date your firm received the results of the search of the license plate number.
7. Title Search Search: Whether your firm has requested a title search on the vehicle.

8. Title Search Requested Date: The date your firm requested a title search on the vehicle.
9. Title Search Received Date: The date your firm received the results of the title search on the vehicle.
10. MV104 Search: Whether your firm has requested a copy of the MV-104 accident report. (Note that the designation "MV104" may only apply to accidents in New York State. In other jurisdictions, this field should be considered simply as "accident report".)
11. MV104 Requested Date: The date your firm requested a copy of the MV-104 accident report. (Note that the designation "MV104" may only apply to accidents in New York State. In other jurisdictions, this field should be considered simply as "accident report".)
12. MV104 Received Date: The date your firm received a copy of the MV-104 accident report. (Note that the designation "MV104" may only apply to accidents in New York State. In other jurisdictions, this field should be considered simply as "accident report".)

Vehicle Damage Table

The Vehicle Damage table is where the details of expenses due to vehicle damage are stored. The Vehicle Damage table is a subtable of the [Vehicles Table](#), which means that each row of the Vehicles table has an individual Vehicle Damage table associated with it, which is specific to the vehicle in that row; open a row of the Vehicles table using the open/close icons (plus sign to open, minus sign to close) to reveal the associated Vehicle Damage table. Each row of the table represents an individual expense. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Vehicle Damage table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--------|--------------------------|-----------|-------------|------------------------|-------------|-----------|----------|----------------|--------|
| Bill # | Type of Damage | Account # | Bill Amount | Negotiated Bill Amount | Submit Date | Date From | Date To | Balance Amount | Action |
| L134 | Repair - Cost of Repairs | 9476 | \$500.00 | \$245.00 | 1/6/2018 | 1/22/2018 | 2/7/2018 | \$0.00 | |
| | Repair - Rental Expense | | \$245.00 | | 1/28/2018 | 1/22/2018 | 2/7/2018 | \$245.00 | |

1. Bill #: The identification number of the bill associated with the expense.
2. Type of Damage: The type of the damage to the vehicle.
3. Account #: The identification number of the account of which the bill is part.
4. Bill Amount: The initial amount of the bill.
5. Negotiated Bill Amount: The amount of the bill after negotiation and/or other discounting.
6. Submit Date: The date the bill was issued by the service provider.
7. Date From: The start date of the period of activity covered by the bill.
8. Date To: The end date of the period of activity covered by the bill.
9. Balance Amount: The outstanding balance on the bill. This field is automatically calculated: if the Negotiated Bill Amount field is not blank, then this column equals the amount in the Negotiated Bill Amount field minus the sum of the Paid Amount column for all rows in the Amount Paid table associated with the bill; otherwise, this column equals the amount in the Bill Amount field minus the sum of the Paid Amount column for all rows in the Amount Paid table associated with the bill.
10. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Vehicle Damage Expense

To edit a vehicle damage expense:

1. Click the [right-click icon](#) in the Action column of the row representing the expense you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for vehicle damage expenses, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Vehicle Damage Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Vehicle Damage Expense

To delete a vehicle damage expense:

1. Click the [right-click icon](#) in the Action column of the row representing the expense you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the expense, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Vehicle Damage Expense

To add a new vehicle damage expense:

1. Click the Add New Vehicle Damage button. This will bring up an Add/Edit panel for vehicle damage expenses, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Vehicle Damage Panel](#) for details about the fields.
3. Click Update to save the expense and close the panel.
 - If you decide you do not wish to save the expense, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Vehicle Damage Panel

The Add/Edit Vehicle Damage Panel allows you to fill in the details of an expense due to vehicle damage. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Type of Damage: The type of the damage to the vehicle.
2. Bill #: The identification number of the bill associated with the expense.
3. Account #: The identification number of the account of which the bill is part.
4. Bill Amount: The initial amount of the bill.
5. Negotiated Bill Amount: The amount of the bill after negotiation and/or other discounting.
6. Date From: The start date of the period of activity covered by the bill.
7. Date To: The end date of the period of activity covered by the bill.
8. Submit date: The date the bill was issued by the service provider.
9. Comments: Any comments about the expense.

Amount Paid Table

The Amount Paid table is where the payment details of claims for vehicle damage are stored. The Amount Paid table is a subtable of the [Vehicles Table](#), which means that each row of the Vehicles table has an individual Amount Paid table associated with it, which is specific to the vehicle in that row; open a row of the Vehicles table using the open/close icon (plus sign to open, minus sign to close) to reveal the associated Amount Paid table. Each row of the table represents an individual payment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Amount Paid table contains the following available columns:

1. Associated Vehicle Damage Bill: Which bill for vehicle damage expenses the payment is for.
2. Claim Submitted Date: The date the claim was made to the insurer regarding the bill.
3. Paid Date: The date the payment was made.
4. Paid By: The contact that made the payment.
5. Collateral: The type of compensation being used to pay the bill.
6. Paid Amount: The amount being paid toward the bill.
7. Action: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Payment for Vehicle Damage

To edit a payment for vehicle damage:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for payments for vehicle damage, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Vehicle Damage Panel](#) for details about the fields.
4. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Payment for Vehicle Damage

To delete a payment for vehicle damage:

1. Click the [right-click icon](#) in the Action column of the row representing the payment you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.

- If you decide you do not wish to delete the payment, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

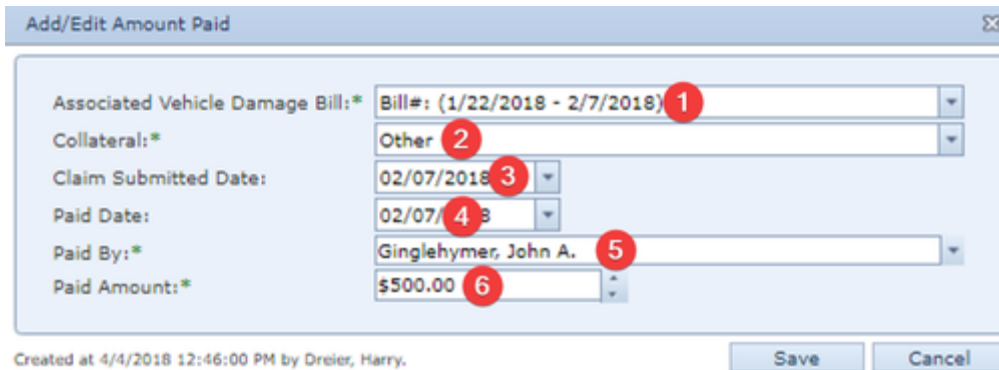
Adding a Payment for Vehicle Damage

To add a new payment for vehicle damage:

1. Click the Add Amount Paid button. This will bring up an Add/Edit panel for payments for vehicle damage, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Vehicle Damage Panel](#) for details about the fields.
3. Click Update to save the payment and close the panel.
 - If you decide you do not wish to save the payment, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Vehicle Damage Payment Panel

The Add/Edit Vehicle Damage Payment Panel allows you to fill in the payment details of a claim for vehicle damage. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

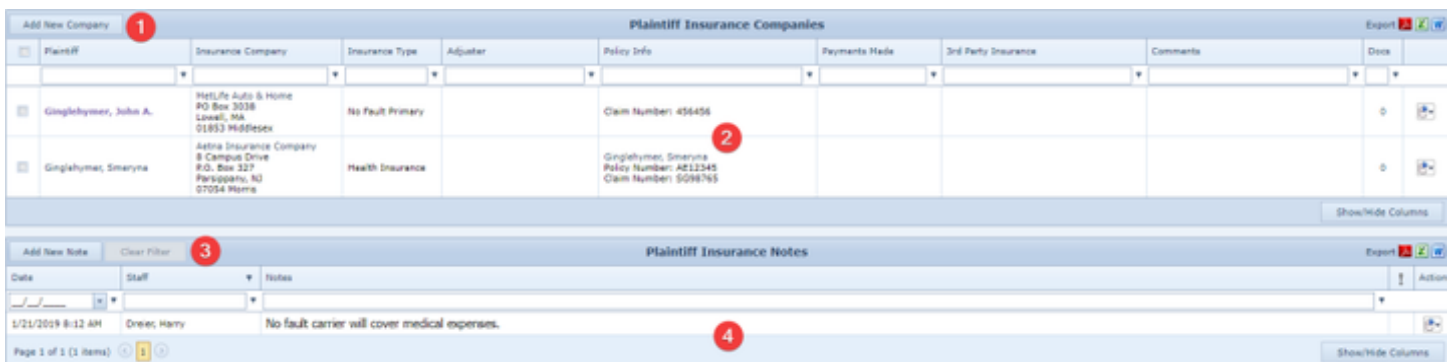


1. Associated Vehicle Damage Bill: Which bill for vehicle damage expenses the payment is for.
2. Collateral: The type of compensation being used to pay the bill.
3. Claim Submitted Date: The date the claim was made to the insurer regarding the bill.
4. Paid Date: The date the payment was made.
5. Paid By: The contact that made the payment.
6. Paid Amount: The amount being paid toward the bill.

Plaintiff Insurance

The Plaintiff Insurance page allows you to view and record the details of plaintiffs' insurance policies that are relevant to the case.

The Structure of This Page



1. Add Insurance Companies button: Used to add a new insurance policy to the case file. See [Adding an Insurance Policy](#).
2. Insurance Companies table: Contains the insurance policy details and allows various actions to be performed on them. See [Insurance Companies Table](#).
3. Add New Note button: Used to add a new Plaintiff Insurance note to the case file. See [Adding a Note](#).
4. Plaintiff Insurance Notes table: Contains Plaintiff Insurance notes and allows various actions to be performed on them. See [Plaintiff Insurance Notes Table](#).

Plaintiff Insurance Companies Table

The Plaintiff Insurance Companies table is where the details of insurance policies are stored. Each row of the table represents an individual policy. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Insurance Companies table contains the following available columns:

| Plaintiff | Insurance Company | Insurance Type | Adjuster | Policy Info | Payments Made | 3rd Party Insurance | Comments | Date |
|--------------------------|---|------------------|----------|---|---------------|---------------------|----------|------|
| <input type="checkbox"/> | MetLife Auto & Home PO Box 3058 Lansett, MA 01853 MA01853 | No Fault Primary | | Claim Number: 45456 | | | | 0 |
| <input type="checkbox"/> | Aetna Insurance Company 8 Campus Drive P.O. Box 327 Farmington, NJ 07054 Morris | Health Insurance | | Gingelhymer, Smeryna Policy Number: AE12345 Claim Number: 5098765 | | | | 0 |

1. Add New Company button: Used to add new Plaintiff Insurance Company to the case file.
2. Checkbox: Used to multi-select two or more insurance companies, which can then be edited or deleted simultaneously.
3. Plaintiff: The plaintiff covered by the policy.
4. Insurance Company: The insurance company that wrote the policy and the company's address.
5. Insurance Type: The type of the insurance and whether it is the plaintiff's primary insurance.
6. Adjuster: The insurance adjuster for the policy and the adjuster's phone number.
7. Policy Info: The details of the policy (the named insured, the policy number, the policy dates, the claim number, the policy limits, and the UM/SUM limits).
8. Payments Made: Total payments made by the insurance company.
9. 3rd Party Insurance: The details of the third-party administrator of the policy (the company administering the policy, the administrator's adjuster for the policy, the adjuster's phone number, and the claim number).
10. Comments: Any comments about the policy.
11. Docs: The number of documents associated with the policy and a link to the documents in the [Documents](#) case page.
12. [column with no title]: A Right-click icon; the right-click menu contains Edit, Copy and Delete. The Copy function cannot be utilized if more than one policy is chosen.

Editing an Insurance Policy:

There are two methods to edit an insurance policy:

1. The first is to click the [right-click icon](#) in the untitled column of the row representing the policy you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The second method to edit an insurance policy is to check two or more checkboxes to the left of the insurance companies you want to edit. Either click the [right-click icon](#) in the untitled column of the row representing the policies you wish to edit, or right-click anywhere in that row. This will bring up a menu of options. Click the Edit option. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in, but only if that information is identical for all of the insurance companies chosen. Fill the any of the fields in with your desired information, which will then be saved in all of the chosen insurance companies.

Deleting an Insurance Policy

There are two methods to delete an insurance policy:

1. The first is to click the [right-click icon](#) in the untitled column of the row representing the policy you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the policy, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

The second method to delete an insurance policy is to check two or more checkboxes to the left of the insurance companies you want to edit. Either click the [right-click icon](#) in the untitled column of the row representing the policies you wish to delete, or right-click anywhere in that row. This will bring up a menu of options. Click the Delete Selected option in the menu. This will bring up a confirmation message (to avoid accidental deletions). Click the OK button in the message to confirm the deletion.

Adding an Insurance Policy

To add a new insurance policy:

1. Click the Add Insurance Companies button. This will bring up an Add/Edit panel for insurance policies, completely blank.
 2. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
 3. Click Save to save the policy and close the panel.
- If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying an Insurance Policy

You can add a new insurance policy by copying the information of an existing one, even from a different case. This can be useful if a policy applies to multiple plaintiffs in the case, if a plaintiff has multiple types of policies from the same insurer, or if the same policy covers one or several defendants in different cases. To copy an insurance policy:

1. Click the [right-click icon](#) in the Action column of the row representing the policy you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for insurance policies, with the information from the policy being copied filled in. One additional field is provided, "Copy to different case". By default, this field is set to the current case you are in, however you can choose any other case and copy the policy to that case.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the policy and close the panel.
 - If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Insurance Panel

The Add/Edit Insurance Panel allows you to fill in the details of an insurance policy. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Insurance' panel with the following fields and callouts:

- 1. Plaintiff: * (Dropdown menu)
- 2. Insurance Company: * (Dropdown menu)
- 3. Primary (Checkbox)
- 4. Insurance Type: * (Dropdown menu)
- 5. Include on the Case Summary (Checkbox)
- 6. Add Adjuster: (Dropdown menu)
- 7. No data to display (Text in table)
- 8. Name of Insured: (Dropdown menu)
- 9. Policy Number: (Text input)
- 10. Claim Number: (Text input)
- 11. Group Number: (Text input)
- 12. ID Number: (Text input)
- 13. Policy Start Date: (Date picker)
- 14. Policy End Date: (Date picker)
- 15. Policy Limits: (Text input)
- 16. (Text input)
- 17. DED: (Text input)
- 18. UM/SUM Policy Limits: (Text input)
- 19. (Text input)
- 20. DED: (Text input)
- 21. Self Insured Amount: (Text input)
- 22. 100% (Checkbox)
- 23. Insurance Limit By Multiple Plaintiff (Checkbox)
- 24. Carrier Has Lien? (Checkbox)
- 25. Comments: (Text area)
- 26. Add to Total Coverage (Checkbox)
- 27. MV Leased: (Dropdown menu)
- 28. Available Coverage Amount: \$0 (Text input)
- 29. Authentication to Defense Counsel (Checkbox)
- 30. (Date picker)
- 31. Organization: (Dropdown menu)
- 32. Adjuster: (Dropdown menu)
- 33. Claim Number: (Text input)

Created at 4/5/2019 10:41:00 AM by De Jesus, Lourdes. Save Cancel

1. Plaintiff: The plaintiff covered by the policy.
2. Insurance Company: The insurance company providing the coverage.

3. Primary: Checkbox that indicates whether the policy is the plaintiff's primary insurance. No plaintiff can have more than one primary policy; if this field is selected when the policy is saved, it will automatically be deselected in every other policy covering the same plaintiff.
4. Insurance Type: The type of the insurance.
5. Include on the Case Summary: Checkbox to determine whether an insurance company that is not marked as Primary will be shown on the Case Summary page.
6. Adjuster: The insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. Multiple adjusters can be assigned to the case, one of which can be designated as Primary.
7. [Adjuster Table]: List of all adjusters assigned to the case. The adjuster designated as Primary will always be displayed first in the list.
8. Name of Insured: The named insured of the policy. If the Select from Plaintiffs and/or Select from Defendants checkbox in the dropdown is selected, the dropdown will only show the plaintiffs and/or the defendants in the case, respectively.
9. Policy Number: The identification number of the policy.
10. Claim Number: The identification number of the claim on the policy related to the case.
11. Group Number: The identification number of the group plan.
12. ID Number: The identification number of the plaintiff in the group plan.
13. Policy Start Date: The start date of the policy.
14. Policy End Date: The end date of the policy.
15. Policy Limits [Individual]: The maximum payment per individual event or injured person.
16. Policy Limits [Aggregate]: The maximum payment per policy period or across all injured people.
17. DED [general]: The deductible that applies to this insurance policy.
18. UM/SUM Policy Limits [Individual]: The maximum payment per injured person in accidents caused by an uninsured or underinsured driver.
19. UM/SUM Policy Limits [Aggregate]: The maximum payment across all injured people in accidents caused by an uninsured or underinsured driver.
20. DED [UM/SUM]: The deductible that applies to the UM/SUM coverage under this insurance policy.
21. Self Insured Amount: The amount that must be paid by the insured before the insurer pays anything.
22. 100%: If checked, the policy is entirely self-insured.
23. Insurance Limit By Multiple Plaintiff: Whether the aggregate policy limits refer to multiple injured individuals or multiple events.
24. Carrier Has Lien?: Whether the insurance company has a lien on the case to recover payments. If this field is selected when a new policy record is created, a lienor record will be created in the [Lien Tracking](#) case page with the insurance company listed as the lienor and the insurance type listed as the lienor type. This checkbox does not function when editing an existing insurance record, however (to avoid accidentally creating multiple liens from a single insurance record).
25. Comments: Any comments about the policy.
26. Add to Total Coverage: Whether the coverage available under this policy should be considered part of the total available coverage in the case. If this field is selected, the value of the Current Coverage Amount field is part of the sum listed in the Liability Coverage line in the [Case Summary](#) page.
27. MV Leased: Whether the vehicle covered by the policy is leased.
28. Available Coverage Amount: The amount of coverage currently available through this policy. Unless the Amount to be Added to Total Coverage field is selected, this field is uneditable.
29. Authentication to Defense Counsel [Checkbox]: Whether the insurance company has been authorized to release the policy information to defense counsel.
30. Authentication to Defense Counsel [Date]: When the insurance company was authorized to release the policy information to defense counsel. Unless the Authentication to Defense Counsel [Checkbox] field is selected, this field is uneditable.
31. Organization [TPA]: The organization serving as third-party administrator of the insurance policy.
32. Adjuster [TPA]: The third-party administrator's insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. When the selection in this field changes, the Phone Number [TPA] field is automatically set to the primary phone number of the selected adjuster.
33. Claim Number [TPA]: The third-party administrator's identification number for the claim on the policy related to the case.

Plaintiff Insurance Notes Table

The Notes table displays the details of notes that have the Plaintiff Insurance type. Each row of the table represents an individual note. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below. See the [Notes](#) case page for viewing notes of all types.

Columns in the Table

The Plaintiff Insurance Notes table contains the following available columns:

| Date | Staff | Type | Notes | Action |
|------------------|---------------|---------------------|--|--------|
| 4/4/2018 3:00 PM | Dreier, Harry | Plaintiff Insurance | No-fault carrier will cover the medical bills. | |

1. Add New Note button: Used to add new Plaintiff Insurance Note to the case file.
2. Clear Filters button: Used to clear any filters that have been placed in one or more columns.
3. Date: The date and time the note was created.
4. Staff: The staff member who created the note.
5. Type: The note's type.
6. Notes: The content of the note, including formatting.
7. [Priority]: The priority level of the note.
8. Action: A Right-click icon; the right-click menu contains Edit, Delete, Email, Print, Email and Copy.

Editing a Note

To edit a note:

1. Click the [right-click icon](#) in the Action column of the row representing the note you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for notes, with the existing information filled in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Emailing a Note

1. To email a note:
 2. Click the [right-click icon](#) in the Action column of the row representing the note you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Email option in the menu. This will open the Case Email panel with the note's creator, date and time of creation, and content automatically entered in the body of the email.
 4. Fill out the email with any desired additional content.
 5. Click Send to send the email. The email will automatically be entered in the Document or Email page.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Note

To print a note:

1. Click the [right-click icon](#) in the Action column of the row representing the note you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Print option in the menu. This will open a new tab containing the details of the note, and immediately bring up your browser's print options for that tab.
 3. The details of the note include the number, name, type and status of the case of which the note is part; the note's type and priority level; the date the note was created; the staff member who created the note; the date the note was modified; the staff member who modified the note; and the contents of the note.
 4. Select the print options you desire and print the note. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
- Note that after printing, the tab containing the note will remain open. You may close this if you wish.

Copying a Note

To copy a note:

1. Click the [right-click icon](#) in the Action column of the row representing the note you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Copy option in the menu. This will bring up a panel allowing you to choose which case file to copy the note to. The panel contains a series of [Radio buttons](#) for the last ten cases you have visited (including the case the note is already in, in case you wish to put an additional copy of the note in the same file). It also includes a [Text input](#) field for a case number, in case you wish to copy the note to a case other than the ten listed.
 3. If you wish to copy the note to one of the last ten cases you have visited, click the radio button associated with that case. If you wish to copy the note to some other case, type that case's case number in the text input field instead.
 4. Click Copy to copy the note to the chosen case file.
- If you decide you do not wish to copy the note, click Cancel instead of clicking Copy to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Note

1. To delete a note:
 2. Click the [right-click icon](#) in the Action column of the row representing the note you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 4. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the note, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Note

To add a new note:

1. Click the Add New Note button. This will bring up The Add/Edit Note Panel with the Plaintiff Insurance type already selected.
2. The note type will still be editable; in theory, you could add any type of note starting from the Plaintiff Insurance page. However, it is generally better practice to use the Add Note icon for notes of types different than the type of note relating to the table you are currently in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Attorneys [Plaintiff]

The Plaintiff Attorneys page allows you to view and record the details of plaintiffs' attorneys, other than your firm.

| Plaintiff | Law Firm | Attorneys | Paralegals | Type | File No | Comments | Removed | Docs |
|--------------------------|--|---------------|-----------------|--------------------|---------|----------|-------------------------------------|------|
| <input type="checkbox"/> | Law Office of Billie Jean 243 West Water Street Minneapolis, MN 55404 Phone: (504) 252-8587 Type: Plaintiff Attorney | Meiser, Heath | Gonzalez, James | Plaintiff Attorney | - | - | <input checked="" type="checkbox"/> | 0 |
| Harka, Jeremy | | | | | | | | |
| <input type="checkbox"/> | Law Office of Billie Jean 243 West Water Street Minneapolis, MN 55404 Phone: (504) 252-8587 Type: Plaintiff Attorney | Meiser, Heath | Gonzalez, James | Plaintiff Attorney | - | - | <input type="checkbox"/> | 0 |
| Harka, Rodney | | | | | | | | |

1. Add New Law Firm button. Used to add a new law firm to the case file. See [Adding a Law Firm](#).
2. Attorneys table. Contains the attorney details and allows various actions to be performed on them. See [Attorneys Table](#).

Attorneys Table

The Attorneys table is where the details of plaintiffs' attorneys are stored, whether they are attorneys also representing the plaintiff represented by your firm, or attorneys representing a plaintiff not represented by your firm (Other Plaintiffs). Each row of the table represents an individual law firm. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Attorneys table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
|--------------------------|---------------|--|---------------|-----------------|--------------------|---|---|-------------------------------------|----|----|
| <input type="checkbox"/> | Harka, Jeremy | Law Office of Billie Jean 243 West Water Street Minneapolis, MN 55404 Phone: (504) 252-8587 Type: Plaintiff Attorney | Meiser, Heath | Gonzalez, James | Plaintiff Attorney | - | - | <input checked="" type="checkbox"/> | 0 | |
| <input type="checkbox"/> | Harka, Rodney | Law Office of Billie Jean 243 West Water Street Minneapolis, MN 55404 Phone: (504) 252-8587 Type: Plaintiff Attorney | Meiser, Heath | Gonzalez, James | Plaintiff Attorney | - | - | <input type="checkbox"/> | 0 | |

1. [column with no title - checkbox]: Multi-select checkboxes which, when checked, allow you to Edit or Delete the chosen law firms simultaneously.
2. Plaintiff: The plaintiff represented by the law firm.
3. Law Firm: The law firm representing the plaintiff, the address of the firm, and the type of representation.
4. Attorneys: The attorneys representing the plaintiff.
5. Paralegals: The paralegals assigned to the case.
6. Type: The type of representation.
7. File No: The law firm's identification number for the case file.
8. Comments: Any comments about the law firm.
9. Removed: Whether the law firm has been removed from the case. A firm that has been removed from the case will be displayed in the Law Firm table with a line stricken through all of the firm's information.
10. Docs: The number of documents associated with the law firm and a link to the documents in the [Documents](#) case page.
11. [column with no title - Action]: The Action icon, a Right-click icon; the right-click menu contains Edit and Delete.

Editing a Law Firm

To edit a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. An alternative method is to check the checkbox on the left side of the rows you want to edit, then right click in any chosen row. Click the Edit Selected option in the menu.
3. Click the Edit option in the menu.
4. This will bring up an Add/Edit panel for law firms, with the existing information filled in.
5. Fill the fields in with your desired information. See [The Add/Edit Law Firm Panel](#) for details about the fields.
6. If you reached the Add/Edit Law Firm Panel by using the alternative method to choose two or more law firms, any changes made will be applied to all of the law firms chosen.
7. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Law Firm

To delete a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. An alternative method is to check the checkbox on the left side of the rows you want to delete, then right click in any chosen row. Click the Delete Selected option in the menu.
3. Click the Delete option in the menu.
4. This will bring up a confirmation message (to avoid accidental deletions).
5. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the law firm, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Law Firm

To add a new law firm:

1. Click the Add New Law Firm button. This will bring up an Add/Edit panel for law firms, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Law Firm Panel](#) for details about the fields.
3. Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying a Law Firm

You can add a new law firm by copying the information of an existing one. This can be useful if a firm represents multiple plaintiffs in the case, or if a plaintiff is represented by multiple law firms or different attorneys at one firm for different aspects of the case. To copy a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for law firms, with the information from the firm being copied filled in.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Law Firm Panel](#) for details about the fields.
4. Note that the Copy function will not be available if you used the checkboxes on the left side of the rows to choose one or more law firms.
5. Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Law Firm Panel

The Add/Edit Law Firm Panel allows you to fill in the details of a law firm. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Law Firm' panel with the following fields and callouts:

- 1. Plaintiff: * (Dropdown menu)
- 2. Law Firm: (Dropdown menu)
- 3. Type: (Dropdown menu)
- 4. Primary [Law Firm]: (Checkbox)
- 5. Add Attorney: (Dropdown menu)
- 6. Primary [Attorney]: (Checkbox)
- 7. Attorney Name: (Text field)
- 8. File No: (Text field)
- 9. Comments: (Text area)

Created at 4/5/2018 10:27:00 AM by Dreier, Harry. Save Cancel

1. Plaintiff: The plaintiff represented by the law firm.
2. Law Firm: The law firm representing the plaintiff.
3. Type: The type of representation.
4. Primary [Law Firm]: Checkbox indicating whether this law firm is the primary law firm representing the plaintiff.
5. Attorney: The attorneys representing the plaintiff. This field allows multiple attorneys to be selected; click the Add hypertext in the dropdown to select an attorney, and it will appear in the table below the dropdown. Click the Delete hypertext in the table to remove an attorney. If there is a contact in the Law Firm field, the dropdown will only show attorneys employed by that contact; click the Show All button to make the dropdown show all attorneys, then click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the law firm.
6. Primary [Attorney]: Checkbox indicating whether this attorney is the primary attorney representing the plaintiff.
7. Attorney Name: The name of the attorney representing the plaintiff.
8. File No: The law firm's identification number for its case file.
9. Comments: Any comments about the law firm.

Lien Tracking

The Lien Tracking page allows you to view and record the details of lienors and individual liens placed on the case. The totals listed on this page are also visible in the Liens tab of the miscellaneous section in the [Case Summary](#) page, but the Liens page contains much more thorough

information, and is the only place where the information can be directly edited.

Some of the lienors and liens on this page may not have been added manually from the page, but instead may have been automatically added when adding an insurance company on the [Plaintiff Insurance](#) page or when [Copying Bills to Liens](#) on the [Medical Providers](#) page. However, it is likely that those lienors and liens will be manually edited from this page to add additional details, especially when the liens are negotiated or paid.

The Structure of This Page

Note: The Add Lien button and Lien History table are both associated with an individual row of the Lienor table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Lien Tracking page, and where in the Lien History table they appear, will depend on which row, if any, of the Lien History table is set to display subtables. See [Subtables and the Open/Closed Column](#).

10.

The screenshot displays the Lien Tracking interface with several tables and buttons. Red circles 1-7 highlight the following elements:

- 1:** The 'Totals' section of the Lien Totals table.
- 2:** The 'Add Lienor' button.
- 3:** The 'Lienor' column in the Lien Tracking table.
- 4:** The 'Add Lien' button.
- 5:** The 'Lien Type' column in the Lien History table.
- 6:** The 'Add Funding Request' button.
- 7:** The 'Lienor' column in the Funding Requests table.

11. Lien Totals table: Displays the totals of various quantities across all types of liens for each plaintiff. See [Lien Totals Table](#).
12. Add Lienor button: Used to add a new lienor to the case file. See [Adding a Lienor](#).
13. Lienor table: Contains the lienor details and allows various actions to be performed on them. See [Lienor Table](#).
14. Add Lien button: Used to add a new lien to the case file. See [Adding a Lien](#).
15. Lien History table: Contains the lien details for a particular lienor and allows various actions to be performed on them. See [Lien History Table](#).
16. Add Funding Request: Used to add a new plaintiff funding request to the case file. See [Adding a Funding Request](#).
17. Funding Requests Table: Contains the plaintiff funding requests details and allows various actions to be performed on them. See [Funding Requests Table](#).

Lien Totals Table

The Lien Totals table summarizes the information in the Lienor and Lien History tables. It is updated automatically when changes are made to the Lienor or Lien History tables; no changes may be made to the Lien Totals table directly. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Lien Totals table contains the following columns:

| Plaintiff | Totals | | | | | | |
|-----------------------|--------------------|-------------------|---------------|---------------|-------------------|---------------|---------------|
| | Unconfirmed | Confirmed | Waived | Negotiated | Current Payoff | Paid | |
| Robinson, A. Beth | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Gingelhymer, Julie A. | \$16,000.00 | \$3,000.00 | \$0.00 | \$0.00 | \$3,130.00 | \$0.00 | \$0.00 |
| Gingelhymer, Smaryna | \$750.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Harka, Rodney | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| | \$16,750.00 | \$3,000.00 | \$0.00 | \$0.00 | \$3,130.00 | \$0.00 | \$0.00 |

1. Plaintiffs: The plaintiff whose lien totals are listed.
2. Unconfirmed: The total of the unconfirmed amounts of all liens on the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.
3. Confirmed: The total of the confirmed amounts of all liens on the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.
4. Waived: The total of the confirmed amounts of all waived liens on the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.
5. Negotiated: The total of the negotiated amounts of all liens on the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.
6. Current Payoff: The amount needed, as of the date the information is entered, to payoff the lien in full.
7. Paid: The total of the amounts paid on all liens on the plaintiff. The sum of this column across all rows in the table appears below the last row of the column.



Lien Tracking Table

The Lienor table is where the details of lienors are stored. Each row of the table represents an individual lienor. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Lienor table contains the following available columns:

| Lien Tracking | | | | | | | | | | |
|---------------|----------------------|-----------------|-----------------|----------------|--|----------|------|----------|--------|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| Add Lienor | Plaintiff | Lienor | Lienor Type | Recovery Agent | Amounts | File # | Docs | Comments | Action | |
| | Dingelhorst, John A. | Smart Litigator | Funding Company | | Unconfirmed Gross: \$2,000.00 Confirmed Gross: \$2,500.00 Current Payoff: \$2,500.00 (9/25/2017) Negotiated: \$1,500.00 (Final) | 121233 | 0 | | | |
| | Dingelhorst, John A. | WBCC | Medical | | Unconfirmed Gross: \$500.00 Confirmed Gross: \$500.00 Current Payoff: \$500.00 (11/12/2018) Negotiated: \$100.00 (Final) | 23412334 | 0 | | | |
| | Dingelhorst, John A. | Doc, John | Doctor | | Unconfirmed Gross: \$12,000.00 | | 0 | | | |

1. Add Lienor button: Used to add a new lienor to the case file. See Add Lienor.
2. [column with no title]: A plus sign  in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Lien History for that lien). Clicking on the plus sign opens the Lien History subtable for that lien holder. The plus sign then turns into a negative sign  which, when clicked, closes the subtable.
3. Plaintiff: The plaintiff whose lien totals are listed.
4. Lienor: The holder of the lien, the representative of the lienor, and the representative's contact number.
5. Lienor Type: The type of liens held by the lienor.
6. Recovery Agent: The contact responsible for recovering the amount of the lien and the representative of the recovery agent.
7. Amounts: The amounts relevant to the lienor (the total unconfirmed amount of all liens held by the lienor, total confirmed amount of all liens held by the lienor, amount currently necessary to pay off the lien and the date of the payoff calculation, and the negotiated total lien and whether that amount is the final amount).
8. File #: The lienor's file number for liens on the plaintiff.
9. Docs: The number of documents associated with the lienor and a link to the documents in the Documents case page.
10. Comments: Any comments about the lienor.
11. Action: A Right-click icon; the right-click menu contains Edit, Delete, and Copy.

Additional columns are available for the Lien Tracking table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are:

1. Certified Mail: The tracking number of the certified mail envelope used to send the check.
2. Check Number: The number of the check used to pay the lien.
3. Confirmed Gross Amount: The total confirmed amount of all liens held by the lienor.
4. Current payoff amount: The amount currently necessary to pay off the lien.
5. Date of current payoff amount: The date the current payoff amount was calculated.
6. Date Paid: The date the lien was paid.
7. Date Release Received: The date the signed release was received by your firm.
8. First Notice: The date your firm first received notice of the lien.
9. Negotiated/Final Lien Amount: The amount to which the total amount of the lien has been reduced, either by negotiation or in proportion to fees, costs, or fault percentage.
10. Negotiation Final Confirmation Date: The date the reduced amount of the lien was confirmed to be the final amount.
11. Policy Received: Whether your firm has received a copy of the insurance policy that created the lien.
12. Receipt Signed: The date the release was signed by the plaintiff.
13. Unconfirmed Gross Amount: The total unconfirmed amount of all liens held by the lienor.

Editing a Lienor

To edit a lienor:

1. Click the [right-click icon](#) in the Action column of the row representing the lienor you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for lienors, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Lienor Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Lienor

To delete a lienor:

1. Click the [right-click icon](#) in the Action column of the row representing the lienor you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the lienor, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Lienor

To add a new lienor:

1. Click the Add Lienor button. This will bring up an Add/Edit panel for lienors, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Lienor Panel](#) for details about the fields.
3. Click Save to save the lienor and close the panel.

- If you decide you do not wish to save the lienor, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
- If you wish to immediately add a lien to the new lienor, click Save & Edit Lien instead of clicking Save to save the lienor, close the Add/Edit panel, and open a new Add/Edit panel for liens, with the Lienor Type, Unconfirmed Gross Amount, and Confirmed Gross Amount fields from the lienor entered into the Lien Type, Unconfirmed Amount, and Confirmed Amount fields of the lien, respectively. See [The Add/Edit Lien Panel](#) for details about the fields.

Copying a Lienor

1. You can add a new lienor by copying the information of an existing one. This can be useful if you have a lienor who has liens on multiple plaintiffs, or if you wish to keep different types of liens for the same lienor in different lienor records. Note that the liens themselves are not copied to the new lienor record; you must add the liens separately. To copy a lienor:
 2. Click the [right-click icon](#) in the Action column of the row representing the lienor you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Copy option in the menu. This will bring up an Add/Edit panel for lienors, with the information from the lienor being copied filled in.
 4. Although the Unconfirmed Gross Amount and Confirmed Gross Amount fields in the Add/Edit panel will contain the same numbers as the lienor being copied, they will be blank in the new lienor because the liens are not being copied.
 5. Make any changes necessary to the information in the fields. See [The Add/Edit Lienor Panel](#) for details about the fields.
 6. Click Save to save the lienor and close the panel.
- If you decide you do not wish to save the lienor, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Lienor Panel

The Add/Edit Lienor Panel allows you to fill in the details of a lienor. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Record' window for a lienor. The fields are as follows:

- 1. Plaintiff: Ginglehymen, John A.
- 2. Lienor Type: Medicaid
- 3. Lienor: GEICO, PO Box 9506, Fredericksburg, VA 22403
- 4. Contact Person: Robinson, A. Seth, 621 Greatview Avenue, Chappaqua, NY 10514
- 5. Recovery Agent: (blank)
- 6. Recovery Contact: (blank)
- 7. Unconfirmed Gross Amount: 7.00
- 8. Confirmed Gross Amount: 8.00
- 9. Current Payoff Amount: \$55.00
- 10. Date of Current Payoff Amount: 01/10/18
- 11. Negotiated/Final Lien Amounts: \$250.00
- 12. Final: (checked)
- 13. File #: 234122534
- 14. Negotiation Final Confirmation Date: 12/12/2017
- 15. Policy Received: (checked)
- 16. ERISA: (checked)
- 17. First Notice Date: (blank)
- 18. Certified Mail: (blank)
- 19. Receipt Signed: (blank)
- 20. Date Paid: (blank)
- 21. Check Number: (blank)
- 22. Date Release Received: (blank)
- 23. Comments: (blank)

1. Plaintiff: The plaintiff subject to the lien.
2. Lienor Type: The type of liens held by the lienor.
3. Lienor: The holder of the lien.
4. Contact Person: The representative of the lienor.
5. Recovery Agent: The contact responsible for recovering the amount of the lien.
6. Recovery Contact: The representative of the recovery agent.
7. Unconfirmed Gross Amount: The total unconfirmed amount of all liens held by the lienor. When editing an existing lienor, this field is uneditable and contains an automatic sum of the Unconfirmed Amount column across all rows in the Lien History subtable for this row. If this field and the Confirmed Gross Amount field are not both blank when a new lienor is added, a lien will be created in the Lien History subtable for the new lienor with the contents of this field in the Unconfirmed Amount column, the contents of the Confirmed Gross Amount field in the Confirmed Amount column, and the contents of the First Notice Date field in the Date column.
8. Confirmed Gross Amount: The total confirmed amount of all liens held by the lienor. When editing an existing lienor, this field is uneditable and contains an automatic sum of the Confirmed Amount column across all rows in the Lien History subtable for this row. If this field and the Unconfirmed Gross Amount field are not both blank when a new lienor is added, a lien will be created in the Lien History subtable for the new lienor with the contents of this field in the Confirmed Amount column, the contents of the Unconfirmed Gross Amount field in the Unconfirmed Amount column, and the contents of the First Notice Date field in the Date column.
9. Current payoff amount: The amount currently necessary to pay off the lien.
10. Date of current payoff amount: The date as of which the current payoff amount was calculated.
11. Negotiated/Final Lien Amount: The amount to which the total amount of the lien has been reduced, either by negotiation or in proportion to fees, costs, or fault percentage.
12. Final: Whether the reduced amount of the lien represents the final lien demand.
13. File #: The lienor's file number for liens on the plaintiff
14. Negotiation Final Confirmation Date: The date the reduced amount of the lien was confirmed to be the final amount.
15. Policy Received: Whether your firm has received a copy of the insurance policy that created the lien.
16. ERISA: Whether the lien is an ERISA lien or not.
17. First Notice Date: The date your firm first received notice of the lien.
18. Certified Mail: The tracking number of the certified mail envelope used to send the check.
19. Receipt Signed: The date the lienor signed the certified mail return receipt.
20. Date Paid: The date the lien was paid.
21. Check Number: The number of the check used to pay the lien.
22. Date Release Received: The date the signed release was received by your firm.
23. Comments: Any comments about the lienor.

Lien History Table

The Lien History table is where the details of liens are stored. The Lien History table is a subtable of the Lienor table, which means that each row of the Lienor table has an individual Lien History table associated with it, which is specific to the lienor in that row; open a row of the Lienor table using the open/close icon to reveal the associated Lien History table. Each row of the table represents an individual lien. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Lien History table contains the following available columns:



| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
|----------|------------|-------------------|-------------|-----------|-----------------------|-----------|--------|--------------|---|--------------------------|-------------------|-----------------|---|--------|
| Add Lien | Date | Method of Service | Unconfirmed | Confirmed | Confirmation Received | Lien Type | Waived | Firm Staff | Itemization | Notification | Service Date From | Service Date To | Comments | Action |
| | 12/11/2017 | Regular Mail | \$300.00 | \$300.00 | 3/7/2018 | Medical | No | Fankin, Judy | Requested: 3/7/2018 Received: 3/7/2018 | Client notified 3/7/2018 | 8/7/2017 | 11/6/2017 | The Medical lien has priority and must be paid first. | |

1. Add Lien button: Used to add a new lien to the case file. See Add Lien.
2. Date: The date your firm received notice of the lien.
3. Method of Service: The means by which your firm was notified of the lien.
4. Unconfirmed Amount: The amount of the lien initially claimed by the lienor.
5. Confirmed Amount: The amount of the lien confirmed by the lienor and your firm to be valid.
6. Confirmation Received: The date the lienor confirmed your firm's reassessment of the lien amount.
7. Lien Type: The type of the lien.
8. Waived: Whether the lien was waived by the lienor.
9. Firm Staff: The staff member responsible for negotiating and handling the lien.
10. Itemization: The dates that an itemized listing of payments was requested and received from the lienor.
11. Notification: The dates that the plaintiff subject to the lien was notified of the lien and responded to the notification.
12. Service Date From: The date the lienor began providing services to plaintiff that resulted in the lien.
13. Service Date To: The date the lienor stopped providing services to plaintiff that resulted in the lien.
14. Comments: Any comments about the lien.
15. Action: A Right-click icon; the right-click menu contains Edit, Copy, and Delete.

Editing a Lien:

To edit a lien:

1. Click the [right-click icon](#) in the Action column of the row representing the lien you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for liens, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Lien Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Lien

To delete a lien:

1. Click the [right-click icon](#) in the Action column of the row representing the lien you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the lien, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Lien

To add a new lien:

1. Click the Add Lien button. This will bring up an Add/Edit panel for liens, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Lien Panel](#) for details about the fields.
 3. Click Save to save the lien and close the panel.
- If you decide you do not wish to save the lien, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying a Lien

You can add a new lien to the same case by copying the information of an existing one. This can be useful if there are multiple liens from a single lienor that have been handled similarly by your firm. To copy a lien:

1. Click the [right-click icon](#) in the Action column of the row representing the lien you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for liens, with the information from the lien being copied filled in.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Lien Panel](#) for details about the fields.

4. Click Save to save the lien and close the panel.

- If you decide you do not wish to save the lien, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Lien Panel

The Add/Edit Lien Panel allows you to fill in the details of a lien. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Date: The date your firm received notice of the lien.
2. Confirmed: Whether the amount of this lien has been confirmed.
3. Lien Type: The type of the lien.
4. Firm Staff: The staff member responsible for negotiating and handling the lien.
5. Service Date From: The date the lienor began providing services to plaintiff that resulted in the lien.
6. Service Date To: The date the lienor stopped providing services to plaintiff that resulted in the lien.
7. Unconfirmed Amount: The amount of the lien initially claimed by the lienor.
8. Itemization Requested: The dates that an itemized listing of payments was requested from the lienor.
9. Confirmed Amount: The amount of the lien confirmed by the lienor and your firm to be valid.
10. Itemization Received: The dates that an itemized listing of payments was received from the lienor.
11. Confirmation Received: The date the lienor confirmed your firm's reassessment of the lien amount.
12. Client Notified: The dates that the plaintiff subject to the lien was notified of the lien and responded to the notification.
13. Method of Service: The means by which your firm was notified of the lien.
14. Client Responded: The date the plaintiff responded to notification of the details of the lien.
15. Waived: Whether the lien was waived by the lienor.
16. Comments: Any comments about the lien.

Prior Claims

The Prior Claims page allows you to view and record the details of insurance claims filed by one of the plaintiffs prior to the inciting incident of the case.

The Structure of This Page

| Plaintiff | Coverage Type | Year | Claim Amount | Recovered Amount | Comments |
|---------------------|----------------------|------|--------------|------------------|--|
| Singlehymen John A. | Collision | 2013 | \$4,000 | \$3,500.00 | |
| Singlehymen John A. | Workers Compensation | 2014 | \$5,685.00 | \$5,820.00 | Injury not related to the injury in this case. |

1. Add Prior Claim button. Used to add a prior claim to the case file. See [Adding a Prior Claim](#).
2. Prior Claims table. Contains the details of prior claims and allows various actions to be performed on them. See [Prior Claims Table](#).

Prior Claims Table

The Prior Claims table is where the details of prior claims are stored. Each row of the table represents an individual claim. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Prior Claims table contains the following available columns:

| Plaintiff | Coverage Type | Year | Claim Amount | Recovery | Recovered Amount | Comments |
|----------------------|----------------------|------|--------------|-------------------------------------|------------------|--|
| Ginglehymer, John A. | Collision | 2013 | \$4,000.00 | <input type="checkbox"/> | \$3,700.00 | |
| Ginglehymer, John A. | Workers Compensation | 2014 | \$9,685.00 | <input checked="" type="checkbox"/> | \$8,520.00 | Injury not related to the injury in this case. |

1. Add Prior Claim: Used to add a prior claim to the case file. See [Adding a Prior Claim](#).
2. Plaintiff: The plaintiff who filed the prior claim.
3. Coverage Type: The type of the insurance against which the prior claim was filed.
4. Year: The year the claim was filed.
5. Claim Amount: The amount of the claim.
6. Recovery: Whether the insurer paid at least part of the claim.
7. Recovered Amount: The amount paid by the insurer on the claim.
8. Comments: Any comments about the claim.
9. [column with no title]: A Right-click icon; the right-click menu contains Edit and Delete.

Editing a Prior Claim

To edit a prior claim:

1. Click the [right-click icon](#) in the untitled column of the row representing the claim you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for prior claims, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Prior Claim Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Prior Claim

To delete a prior claim:

1. Click the [right-click icon](#) in the untitled column of the row representing the claim you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the claim, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Prior Claim

To add a new prior claim:

1. Click the Add Prior Claim button. This will bring up an Add/Edit panel for prior claims, blank except for defaults.
 2. Fill the fields in with your desired information. See [The Add/Edit Prior Claim Panel](#) for details about the fields.
 3. Click Save to save the claim and close the panel.
- If you decide you do not wish to save the claim, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Prior Claim Panel

The Add/Edit Prior Claim Panel allows you to fill in the details of a prior claim. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Created at 4/5/2018 2:55:00 PM by Dreier, Harry.

Save Cancel

1. Plaintiff: The plaintiff who filed the prior claim.
2. Recovery: Whether the insurer paid at least part of the claim.
3. Coverage Type: The type of the insurance.
4. Recovered Amount: The amount paid by the insurer on the claim.

5. Year: The year the claim was filed.
6. Claim Amount: The amount of the claim.
7. Comments: Any comments about the claim.

Plaintiff UDFs

The Plaintiff UDFs page contains all user-defined fields for the case's case type that have Plaintiff as their Screen value. It is used to store any information about the plaintiff that is not otherwise covered by some page in SmartAdvocate. See the [UDF Editor](#) page for creating and managing user-defined fields, for a description of the available field formats, and for an explanation of how user-defined fields are organized on this and other UDF pages.

Plaintiff Fact Sheet

The Plaintiff Fact Sheet page contains all user-defined fields for the case's case type that have PFS as their Screen value. It is used to store and organize the information about the incident and the plaintiff that is included in the case's plaintiff fact sheet. See the [UDF Editor](#) page for creating and managing user-defined fields, for a description of the available field formats, and for an explanation of how user-defined fields are organized on this and other UDF pages.

Arb/Mediations

The ARB/Mediations page allows you to view and record the details of arbitration or mediation of the case.

The Structure of This Page

The Arbitration/Mediation table is where the details of arbitrations and mediations are stored. Each row of the table represents an individual arbitration or mediation. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

The columns in this table are:

| Arbitration / Mediation | | | | | | | | | | | | | | | | |
|-----------------------------|----------------------------|----------------------------|--------------|--------------|------------------------------|---------------------|--------------|--------------|---------------|--------------|--------------|---------------------------|----------|------|-----------|--------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| ADD ARBITRATION / MEDIATION | Arbitration/Mediation Type | Dispute Resolution Company | Contact Name | Plaintiff | Arbitration/Mediation File # | Arbitrator/Mediator | Hearing Date | Mailing Date | Decision Date | Receipt Date | Award Amount | Last Date to Appeal Award | Comments | Docs | Documents | Action |
| | Mediation | Simple Mediation Solutions | Moore, Barry | Exp. Jessica | 324531 | Moore, Barry | 3/17/2023 | 3/28/2023 | | | | | | 0 | | |

1. **Add Arbitration/Mediation button:** Used to add a new arbitration or mediation to the case file. See Adding an Arbitration or Mediation
2. **Arbitration/Mediation Type:** The type of the arbitration or mediation
3. **Dispute Resolution Company:** The organization providing the arbitrator or mediator.
4. **Contact Name:** The arbitrator or mediator.
5. **Plaintiff:** The plaintiffs subject to the arbitration or mediation.
6. **Arbitration/Mediation File #:** The file number used by the arbitration/mediation organization for this case.
7. **Arbitrator/Mediator:** The individual arbitrating/mediating the event.
8. **Hearing Date:** The date of the arbitration or mediation.
9. **Mailing Date:** The date the arbitrator's decision was mailed to all parties.
10. **Decision Date:** The date the arbitrator rendered a decision.
11. **Receipt Date:** The date the arbitrator's decision was received by your firm.
12. **Award Amount:** The amount awarded to the plaintiffs as a result of the arbitration/mediation date.
13. **Last Date to Appeal Award:** The deadline to appeal the arbitration decision to the court.
14. **Comments:** Any comments about the arbitration or mediation.
15. **Docs:** The number of documents associated with the arbitration/mediation and a link to the documents in the Documents case page.
16. **Documents:** A direct link to the documents attached to the arbitration/mediation entry. Clicking the name of the document in this column will open that document.
17. **Action:** Right-click icon; right-click menu contains Edit and Delete..

Editing an Arbitration or Mediation

To edit an arbitration or mediation:

1. Click the right-click icon in the untitled column of the row representing the arbitration or mediation you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for arbitrations and mediations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Arbitration/Mediation Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - a. If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Arbitration or Mediation

To delete an arbitration or mediation:

1. Click the right-click icon in the untitled column of the row representing the arbitration or mediation you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.

- a. If you decide you do not wish to delete the arbitration or mediation, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- b. Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.
- c. Deleting the arbitration/mediation date entry not delete the appointment created through the The Add/Edit Event Details Panel; you will have to delete that separately in the [Calendar](#).

Adding an Arbitration or Mediation

To add a new arbitration or mediation:

1. Click the Add Arbitration/Mediation button. This will bring up an Add/Edit panel for arbitrations and mediations, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Arbitration/Mediation Panel](#) for details about the fields.
3. Click Save to save the arbitration or mediation and close the panel.
 - a. If you decide you do not wish to save the arbitration or mediation, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Mediation Panel

Edit Record ✕

Arbitration/Mediation Type: **1** Mediation

Dispute Resolution Company: **2** Simple Mediation Solutions - 68 S Service Rd, Melville, NY

Contact Name: **3** Moore, Barry - 920 Century Drive , Mechanicsburg, PA

Plaintiff*: **4**

All
 Day, Jessica

Arbitration/Mediation File #: **5** 324531

Arbitrator/Mediator: **6** Moore, Barry - 920 Century Drive , Mechanicsburg, PA

Hearing Date: 02/17/2023 **7** EDIT **8**

Mailing Date: **9** 02/20/2023

Decision Date: **10** _/_/___

Receipt Date: **11** _/_/___

Award Amount: **12** ^

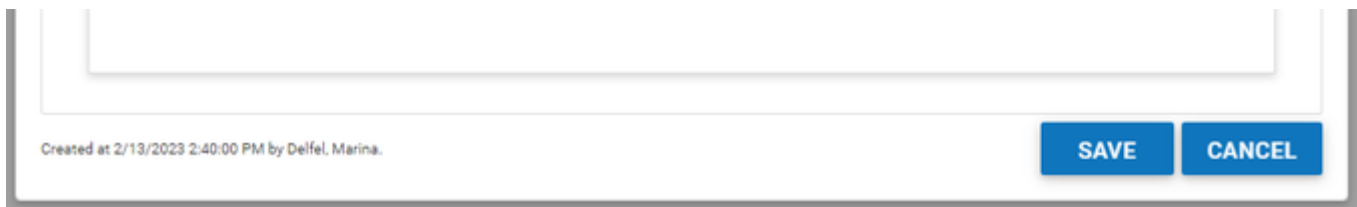
Last Date to Appeal Award: **13** _/_/___

Comments: **14**

Related Documents: ATTACH SELECT

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |

17



1. **Arbitration/Mediation Type:** The type of the arbitration or mediation. To add additional items to this list see [Picklist Maintenance - Arbitration Mediation Types](#).
2. **Dispute Resolution Company:** The organization providing the arbitrator or mediator.
3. **Contact Name:** The contact to communicate with from the Arbitrating/Mediating Company.
4. **Plaintiff:** Checkboxes allowing you to select which plaintiffs are subject to the arbitration or mediation.
5. **Arbitration/Mediation File #:** The file number used by the arbitration/mediation organization for this case.
6. **Arbitrator/Mediator:** The individual arbitrating/mediating the event.
7. **Hearing Date:** A non-fillable text box which contains the date of the arbitration or mediation entered by creating a calendar appointment using the Edit button.
8. **Edit button:** Opens a new appointment screen, with a default Appointment type of Mediation. For more on creating appointments, please see [Adding Appointments](#).
9. **Mailing Date:** The date the arbitrator's decision was mailed to all parties.
10. **Decision Date:** The date the arbitrator rendered a decision.
11. **Receipt Date:** The date the arbitrator's decision was received by your firm.
12. **Award Amount:** The amount awarded to the plaintiffs as a result of the arbitration/mediation date.
13. **Last Date to Appeal Award:** The deadline to appeal the arbitration decision to the court.
14. **Comments:** Any comments about the arbitration or mediation.
15. **Attach button:** Allows you to attach new documents to the arbitration/mediation entry that will also be pushed to the documents screen.
16. **Select button:** Allows you to attach documents already attached to your case to the arbitration/mediation entry.
17. **[Document Table]:** A table containing the documents that have been attached to the arbitration/mediation entry.

Editing an Arbitration/Mediation Date

To edit an arbitration/mediation date:

1. Click the right-click icon in the untitled column of the row representing the date you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit appointment panel, with the existing information filled in.
3. Click Save to save the changes and close the panel.
 - a. If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Adverse Exams

The Adverse Exams page allows you to view and record the details of independent or adverse medical examinations.

The Structure of This Page

Note: The Add Exam Details button and Adverse Exam Details table are both associated with an individual row of the Adverse Exams table, and only appear if the subtable for that row is open. For that reason, whether these tables appear in your Adverse Exams page, and where in the Adverse Exams table they appear, will depend on which row, if any, of the Adverse Exams table has its subtable open. See [Subtables and the Open/Closed Column](#).

HD113- Ginglehymer, John v- Ripspeed, Mary Auto Accident (Intersection, Left Turn, Rear End) 2/20/2015 FL Attorney: Pezon, Christopher Case Manager: Cicali, Joseph Paralegal: Parker, Sean

| ADD ADVERSE EXAM 1 | | | | | | | | | | | | Adverse Exams | | | | | | | | | | | | Export | | |
|----------------------|--------------------------------------|---------------------------|-------------------|------------------|----------|--------|--------------|--------------------------|------|----------|---------|----------------------|--|--|--|--|--|--|--|--|--|--|--|--------|--|--|
| Plaintiff | Examiner | Exam Type | Scheduling Agency | Contact | Location | Expert | Will Testify | Held | Docs | Comments | Actions | | | | | | | | | | | | | | | |
| Ginglehymer, John A. | Independent Medical Examinations, PC | Defendant's Physical Exam | GEM Adjusters LTD | (516) 555-1234 2 | | ? | ? | <input type="checkbox"/> | 0 | | | | | | | | | | | | | | | | | |
| ADD EXAM DETAILS 3 | | | | | | | | | | | | Adverse Exam Details | | | | | | | | | | | | | | |
| Exam Date | Benefit Denied | Cut-Off Date | Record Dates | Report Dates | Comments | | | | | | | Actions | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No data to display | | | | | | | | | | | | | | | | | | | | | | | | | | |

1. Add Adverse Exam button. Used to add a new examination to the case file. See [Adding an Examination](#).
2. Adverse Exams table. Contains the personnel and location details of examinations and allows various actions to be performed on them. See [Adverse Exams Table](#).
3. Add Exam Details button. Used to add the scheduling and outcome details of a particular examination to the case file. See [Adding Examination Details](#).
4. Adverse Exam Details table. Contains the scheduling and outcome details of examinations and allows various actions to be performed on them. See [Adverse Exam Details Table](#).

Adverse Exams Table

The Adverse Exams table is where the personnel and location details of examinations are stored. Each row of the table represents an individual examination (or set of examinations, if for some reason the examination requires more than one appointment). See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Adverse Exams table contains the following available columns:

| ADD ADVERSE EXAM | | | | | | | | | | | | | | Adverse Exams | | | | Export |
|------------------|---------------------|---------------|---------------------------|-------------------|-------------------|----------|---|--------------|------|--------------------------|----------|---------|----|---------------|--|--|--|--------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | | | | | |
| Plaintiff | Examiner | Exam Type | Scheduling Agency | Contact | Insurance Company | Location | Expert | Will Testify | Held | Docs | Comments | Actions | | | | | | |
| > | Ginglehymr, John A. | G&R Adrien MD | Defendant's Physical Exam | GEM Adjusters LTD | (516) 555-1235 | GEICO | 470 Pennsylvania Avenue Brooklyn NY 11207 | ? | ? | <input type="checkbox"/> | 0 | | | | | | | |

- [column with no title]: A right arrow (>) in this column indicates that additional information is available for the row in which the arrow is located (in this instance, Adverse Exam Details). Clicking on the right arrow opens the Adverse Exam Details subtables for that examination. The right arrow then turns into a down arrow (v) which, when clicked, closes the subtable.
- Plaintiff: The plaintiff being examined.
- Examiner: The doctor performing the examination.
- Exam Type: The purpose of the examination (generally the benefits being contested).
- Scheduling Agency: The scheduling agency supplying the examiner.
- Insurance Company: The insurance company requesting the examination.
- Contact: The phone number of the scheduling agency.
- Location: The location of the examination.
- Expert: Whether the examiner is also acting as an expert.
- Will Testify: Whether the examiner is willing to testify.
- Held: Whether the examination has occurred.
- Docs: The number of documents associated with the examination and a link to the documents in the **Documents** case page.
- Comments: Any comment entered on the Edit Adverse Exam panel.
- Actions: Contains an **Edit** icon and a **Delete** icon.

Editing an Examination

To edit an examination:

- Right-click anywhere in the row representing the examination you wish to edit. This will bring up a menu of options.
- Alternatively, you can click the **Edit** icon in the Actions column of the row representing the examination you wish to edit. This will bring up an Add/Edit panel for examinations, with the existing information filled in. Skip to step 3.
- Click the Edit option in the menu. This will bring up an Add/Edit panel for examinations, with the existing information filled in.
- Fill the fields in with your desired information. See [The Add/Edit Examination Panel](#) for details about the fields.
 - Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Examination

To delete an examination:

- Right-click anywhere in the row representing the examination you wish to delete. This will bring up a menu of options.
 - Alternatively, you can click the **Delete** icon in the Actions column of the row representing the examination you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
- Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the examination, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Examination

To add a new examination:

- Click the Add Adverse Exam button. This will bring up an Add/Edit panel for examinations, completely blank.
- Fill the fields in with your desired information. See [The Add/Edit Examination Panel](#) for details about the fields.
- Click Save to save the examination and close the panel.
 - If you decide you do not wish to save the examination, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Examination Panel

The Add/Edit Examination Panel allows you to fill in the personnel and location details of an examination. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Adverse Exam

| | | | |
|--------------|------------------------------|--------------|------------------------------------|
| Plaintiff: * | Ginglehymr, John A. 1 | Exam Type: * | Defendant's Physical Exam 2 |
|--------------|------------------------------|--------------|------------------------------------|

Plaintiff:

Doctor's Name: *

Scheduling Agency: *

Insurance Company:

Location:

Comment:

Expert: Will Testify: Held

1. Plaintiff: The plaintiff being examined.
2. Exam Type: The purpose of the examination (generally the benefits being contested).
3. Doctor's Name: The doctor performing the examination.
4. Use As Location [Doctor]: Button to insert the Doctor's address as the location for the examination.
5. Scheduling Agency: The scheduling agency supplying the examiner.
6. Use As Location [Scheduling Agency]: Button to insert the Scheduling Agency's address as the location for the examination.
7. Insurance Company: The insurance company requesting the examination.
8. Location: The location of the examination. This field can be completed manually or by clicking on one of the two Use As Location buttons.
9. Comment: Space to add a Comment about this Adverse Exam.

10. Expert: Whether the examiner is also acting as an expert.

11. Will Testify: Whether the examiner is willing to testify.

12. Held: Whether the examination has occurred.

Adverse Exam Details Table

The Adverse Exam Details table is where the scheduling and outcome details of examinations are stored. The Adverse Exam Details table is a subtable of the Adverse Exams table, which means that each row of the Adverse Exams table has an individual Adverse Exam Details table associated with it, which is specific to the examination in that row; open a row of the Adverse Exams table using the open/close icon (right arrow to open, down arrow to close) to reveal the associated Adverse Exam Details table. Each row of the table represents an individual examination appointment. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Adverse Exam Details table contains the following available columns:

| ADD EXAM DETAILS | | | | | | | Adverse Exam Details | |
|--|--------------------------|-------------------------------|--|--|--|-------------------------------------|---------------------------------------|--|
| Exam Date | Benefit Denied | Cut-Off Date | Record Dates | Report Dates | Comments | Actions | | |
| <input type="text" value="1/16/2023"/> | <input type="checkbox"/> | <input type="text" value=""/> | <input type="text" value="Record Requested: 1/17/2023 Record Received: 2/7/2023"/> | <input type="text" value="Report Requested: 1/17/2023 Report Received: 2/1/2023"/> | <input type="text" value="Adverse exam completed."/> | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> | |

1. Exam Date: The date of the examination appointment.
2. Benefit Denied: Whether (as a result of the examination) benefits were denied to the plaintiff.
3. Cut-Off Date: The date on which benefits to the plaintiff are to cease as a result of the examination.
4. Record Dates: The dates the medical records from the examination were requested and received.
5. Report Dates: The dates the examiner's reports from the examination were requested and received.
6. Comments: Any comments about the examination.
7. Actions: An Edit icon and a Delete icon.

Editing Examination Details

To edit examination details:

1. Right-click anywhere in the row representing the examination details you wish to edit. This will bring up a menu of options.
 - o Alternatively, you can click the Edit icon in the Actions column of the row representing the examination details you wish to edit. This will bring up an Add/Edit panel for examination details, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for examination details, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Examination Details Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.

o If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Examination Details

To delete examination details:

1. Right-click anywhere in the row representing the examination details you wish to delete. This will bring up a menu of options.
 - o Alternatively, you can click the **Delete** icon in the Actions column of the row representing the examination details you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - o If you decide you do not wish to delete the examination details, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - o Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Examination Details

To add new examination details:

1. If the row representing the examination you wish to add the details to is not open, click the open/close icon (right arrow to open, down arrow to close) for the row. This will reveal the Adverse Exam Details subtable for that row.
2. Click the Add Exam Details button. This will bring up an Add/Edit panel for examination details, completely blank.
3. Fill the fields in with your desired information. See [The Add/Edit Examination Details Panel](#) for details about the fields.
4. Click Save to save the examination details and close the panel.
 - o If you decide you do not wish to save the examination details, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Examination Details Panel

The Add/Edit Examination Details Panel allows you to fill in the scheduling and outcome details of an examination. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Edit Adverse Exam Details

The screenshot shows the 'Edit Adverse Exam Details' panel with the following fields and callouts:

- Exam Date:** 01/17/23 (1), 10 (2), CALENDAR (3)
- Benefit Denied:** (4)
- Cut-Off Date:** _/_ (5)
- Reports:**
 - Request Sent Date: (6) /17/2023 (7)
 - Expected Date: 01 (7) /23 (7)
 - Received Date: 02/01/20 (8)
- Records:**
 - Request Sent Date: (9) 7/2023 (9)
 - Expected Date: 02/0 (10) /23 (10)
 - Received Date: 02/07/202 (11)
- Comments:** Adverse exam completed. (12)
- Buttons:** SAVE, CANCEL

1. Exam Date: The date of the examination appointment.
2. Exam Time (unlabeled): The time of the examination appointment.
3. Calendar: Opens an Appointment panel from the Case Calendar that can be filled in with the Adverse Exam Appointment details (when, where, attendees, etc.).

4. Benefit Denied: Whether (as a result of the examination) benefits were denied to the plaintiff.
5. Cut-Off Date: The date on which benefits to the plaintiff are to cease as a result of the examination.
6. Request Sent Date [Reports]: The date the medical records from the examination were requested.
7. Expected Date [Reports]: The date the medical records from the examination are expected to arrive.
8. Received Date [Reports]: The date the medical records from the examination were received.
9. Request Sent Date [Records]: The date the examiner's reports from the examination were requested.
10. Expected Date [Records]: The date the examiner's reports from the examination are expected to arrive.
11. Received Date [Records]: The date the examiner's reports from the examination were received.
12. Comments: Any comments about the examination.

Attorneys

This page is currently under construction. Check back for updates!

Complaints

The Complaint/Answer screen allows you to view and record the details of complaints and answers in the case.

The Structure of This Page

| 23-A-00012- Swanson, Todd -v- Robinson, Terry-Ann | | Auto Accident (Rear End, Red Light) 3/24/2023 GA | | | | Attorney: Aleksandrov, Yuriy | |
|---|---------------------------------------|--|---|---|-----------|------------------------------|----------|
| Complaints/Answers | | | | | | | |
| Defendant 1 | SOL 2 | Summons and Complaint 3 | Service 4 | Answer 5 | Comment 6 | Documents 7 | Action 8 |
| Robinson, Terry-Ann I. | Date: 3/24/2025 Complied: 4/5/2023 | Filing Date: 4/5/2023 | Last Date to Serve: 8/3/2023 Date Of Service: 4/6/2023 | Due Date: 5/6/2023 Received Date: 4/6/2023 | | | |

1. Defendant's Name
2. Statues of Limitation Information: Shows the SOL date and the date the SOL is complied.
3. Summons and Complaint Information: Shows the last date to file and the filing date of the summons and complaint.
4. Service Information: Shows last date to serve, the date the summons and complaint were sent to the process server, and the date of service.
5. Answer Information: Shows Answer due date and date answer is received.
6. Comment: Shows any comments related to summons and complaint.
7. Documents: Shows links to documents linked to Summons and Complaint entry.
8. Action Icon

Most of the information on this screen is taken from the **Add/Edit Defendant SOL panel**. No information can be added, edited, or deleted directly from this page. However, you can right-click on any row on the page and select Edit; This will open the Edit Defendant SOL panel.

Employment

This page is currently under construction. Check back for updates!

[How to Make Entries for Lost Wages](#)

Injuries

The Injuries screen allows for the viewing and recording of injuries to plaintiffs in the case.

Structure of This Page

This page is first populated by the quick injuries selected in the case wizard during the intake of the case. The quick injuries are listed in the injury details as a sub-table to the injuries summary table. The information listed in the injury details sub-table includes:

| Plaintiff | Injuries Summary | Pleadings Summary | Confinements | Actions |
|---------------|--|--|--------------|---------|
| Swanson, Todd | airbag injury Back Herniated Discs Epidural Steroid Injection Edema, Loss of Range of Motion, Muscle Spasm Neck Pain | airbag injury Back Herniated Discs Epidural Steroid Injection Edema, Loss of Range of Motion, Muscle Spasm Neck Pain | | |

| ADD INJURY DETAILS | | ADD INJURIES USING ICD CODES | | Injury Details | | | | | Export |
|--------------------|------------------------|------------------------------|----------------------------|--|--------------------|---------------|------------|-------------|---------|
| Injury Date 1 | Injury 2 | Sub BP | Treatments 3 | Sequelae 4 | Medical Provider 5 | Description 6 | Comments 7 | ICD Codes 8 | Actions |
| | airbag injury | No | | | | | | | |
| | Back - Herniated Discs | No | Epidural Steroid Injection | Edema, Loss of Range of Motion, Muscle Spasm | | | | | |

1. Injury Date
2. Name of the injury
3. Treatments to the injury
4. Sequelae associated with the injury
5. Medical Provider associated with the injury
6. Description of the injury
7. Comments
8. Injury ICD Code

By clicking on the Add Injury Details button, the following information can be indicated:

SUMMARY MERGEABLE DESCRIPTION

Specific Injury
 Quick Injury
 Other Injury **1**

Body Part (Add New)

2 Left Right

ALL

Injury (Add New)

- Emboli
- Herniated Discs
- Impingement
- Linear Fracture
- Muscle Spasm

- Anterior cruciate
- Anterior fossa
- Arm
- Artery
- Back **3**
- Basal

Sequelae (Add New)

- Arthritis
- Deformity
- Edema
- Headaches
- Leg Shortening
- Limp

Treatments (Add New)

- Discectomy
- Epidural Steroid Injection
- Laminectomy
- Lumbar Support
- Microsurgical Discectomy
- Myelogram with Contrast

Injury / Diagnosis Date: **7** Date Established: **8** Consequential

Medical Providers:

Northside Hospital

ADD MEDICAL PROVIDER

Additional Injury Description: **10**

Sub BP / Interrogatories Required

Comments: **11**

SAVE

CANCEL

1. Indication if the injury being entered is a specific injury, a quick injury, or other injury
2. The side of the body where the injury is located. This can be multi-selected for bilateral injuries.
3. Selection of a body part
4. Selection of an injury. New injuries can be added by clicking on Add New.
5. Selection of sequelae associated with the injury. This can be multi-selected. New sequelae can be added by clicking on Add New.
6. Selection of treatments associated with the injury. New treatments can be added by clicking on Add New.

7. Injury/Diagnosis Date
8. Date injury was established
9. Medical provider(s) associated with the diagnosis of the injury. This can be multi-selected. A new medical provider can be added by clicking Add Medical Provider. See [Medical Providers](#) for additional details.
10. Additional injury description
11. Comments

After all injury details have been added for the plaintiff, an injury summary can be added to the case by selecting the edit option on the mouse icon.

| Plaintiff | Injuries Summary | Pleadings Summary | Confinements | Actions |
|---------------|--|--|--------------|---|
| Swanson, Todd | airbag injury Back Herniated Discs Epidural Steroid Injection Edema, Loss of Range of Motion, Muscle Spasm Neck Pain | airbag injury Back Herniated Discs Epidural Steroid Injection Edema, Loss of Range of Motion, Muscle Spasm Neck Pain | | <div style="border: 1px solid gray; padding: 2px;"> Edit Delete Add Details </div> |

| Injury Details | | | | | | | | | |
|----------------|--------|--------|------------|---------|------------------|-------------|----------|-----------|---------|
| Injury Date | Injury | Sub BP | Treatments | Sequela | Medical Provider | Description | Comments | ICD Codes | Actions |
| | | | | | | | | | |

Once the injury summary panel is opened, the following information can be indicated:

Under the summary tab-

Edit Record

SUMMARY
CONFINEMENTS

Plaintiff: * Swanson, Todd (D)

Injuries Summary:
airbag injury
Back Herniated Discs Epidural Steroid Injection Edema, Loss of Range of Motion, Muscle Spasm
Neck Pain
1
 AUTO-POPULATE

Pleadings Summary:
airbag injury
Back Herniated Discs Epidural Steroid Injection Edema, Loss of Range of Motion, Muscle Spasm
Neck Pain
2
 AUTO-POPULATE

Created at 3/30/2023 8:24:00 AM by Clark, Tril.
Modified at 3/30/2023 9:59:00 AM by Clark, Tril.

SAVE
CANCEL

1. Written summary of plaintiff's injuries. This field can be auto-populated with the injury details entered for the plaintiff by clicking the Auto-populate button.
2. Written summary of plaintiff's injuries specified for the pleading documents. This field can be auto-populated with the injury details entered for the plaintiff by clicking the Auto-populate button.

Under the confinements tab-

Edit Record

SUMMARY
CONFINEMENTS

Confined to Hospital:

1

Confined to Bed:

2

Confined to Home:

3

Incapacitated:

4

Comments:

5

Created at 3/30/2023 8:24:00 AM by Clark, Treil.
Modified at 3/30/2023 9:59:00 AM by Clark, Treil.

SAVE CANCEL

1. Information regarding the plaintiff's confinement to a hospital
2. Information regarding the plaintiff's confinement to a bed
3. Information regarding the plaintiff's confinement to his/her home
4. Information regarding the plaintiff's additional incapacitation
5. Additional comments regarding confinement and incapacitation

Injuries- Prior

This page is currently under construction. Check back for updates!

Plaintiff Insurance

The Plaintiff Insurance page allows you to view and record the details of plaintiffs' insurance policies that are relevant to the case.

The Structure of This Page

1

2

3

4

1. Add Insurance Companies button: Used to add a new insurance policy to the case file. See [Adding an Insurance Policy](#).
2. Insurance Companies table: Contains the insurance policy details and allows various actions to be performed on them. See [Insurance Companies Table](#).
3. Add New Note button: Used to add a new Plaintiff Insurance note to the case file. See [Adding a Note](#).
4. Plaintiff Insurance Notes table: Contains Plaintiff Insurance notes and allows various actions to be performed on them. See [Plaintiff Insurance Notes Table](#).

Plaintiff Insurance Companies Table

The Plaintiff Insurance Companies table is where the details of insurance policies are stored. Each row of the table represents an individual policy. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Insurance Companies table contains the following available columns:

1

2

3

4

5

6

7

8

9

10

11

12

1. Add New Company button: Used to add new Plaintiff Insurance Company to the case file.
2. Checkbox: Used to multi-select two or more insurance companies, which can then be edited or deleted simultaneously.
3. Plaintiff: The plaintiff covered by the policy.
4. Insurance Company: The insurance company that wrote the policy and the company's address.
5. Insurance Type: The type of the insurance and whether it is the plaintiff's primary insurance.
6. Adjuster: The insurance adjuster for the policy and the adjuster's phone number.
7. Policy Info: The details of the policy (the named insured, the policy number, the policy dates, the claim number, the policy limits, and the UM/SUM limits).
8. Payments Made: Total payments made by the insurance company.
9. 3rd Party Insurance: The details of the third-party administrator of the policy (the company administering the policy, the administrator's adjuster for the policy, the adjuster's phone number, and the claim number).
10. Comments: Any comments about the policy.
11. Docs: The number of documents associated with the policy and a link to the documents in the [Documents](#) case page.
12. [column with no title]: A Right-click icon; the right-click menu contains Edit, Copy and Delete. The Copy function cannot be utilized if more than one policy is chosen.

Editing an Insurance Policy:

There are two methods to edit an insurance policy:

1. The first is to click the [right-click icon](#) in the untitled column of the row representing the policy you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Edit option in the menu. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in.
 3. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
 4. Click Save to save the changes and close the panel.
- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The second method to edit an insurance policy is to check two or more checkboxes to the left of the insurance companies you want to edit. Either click the [right-click icon](#) in the untitled column of the row representing the policies you wish to edit, or right-click anywhere in that row. This will bring up a menu of options. Click the Edit option. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in, but only if that information is identical for all of the insurance companies chosen. Fill the any of the fields in with your desired information, which will then be saved in all of the chosen insurance companies.

Deleting an Insurance Policy

There are two methods to delete an insurance policy:

1. The first is to click the [right-click icon](#) in the untitled column of the row representing the policy you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 3. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the policy, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

The second method to delete an insurance policy is to check two or more checkboxes to the left of the insurance companies you want to edit. Either click the [right-click icon](#) in the untitled column of the row representing the policies you wish to delete, or right-click anywhere in that row. This will bring up a menu of options. Click the Delete Selected option in the menu. This will bring up a confirmation message (to avoid accidental deletions). Click the OK button in the message to confirm the deletion.

Adding an Insurance Policy

To add a new insurance policy:

1. Click the Add Insurance Companies button. This will bring up an Add/Edit panel for insurance policies, completely blank.
 2. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
 3. Click Save to save the policy and close the panel.
- If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying an Insurance Policy

You can add a new insurance policy by copying the information of an existing one, even from a different case. This can be useful if a policy applies to multiple plaintiffs in the case, if a plaintiff has multiple types of policies from the same insurer, or if the same policy covers one or several defendants in different cases. To copy an insurance policy:

1. Click the [right-click icon](#) in the Action column of the row representing the policy you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for insurance policies, with the information from the policy being copied filled in. One additional field is provided, "Copy to different case". By default, this field is set to the current case you are in, however you can choose any other case and copy the policy to that case.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the policy and close the panel.

- If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Insurance Panel

The Add/Edit Insurance Panel allows you to fill in the details of an insurance policy. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Edit Insurance
✕

Plaintiff:* 1

Insurance Company:* 2 Primary 3

Insurance Type:* 4 Include on the Case Summary 5

Adjuster:

Add Adjuster: 6

| Primary | Adjuster Name | ▲ | # |
|----------------------|---------------|---|---|
| No data to display 7 | | | |

Name of Insured: 8

Policy Number: 9 Claim Number: 10

Group Number: 11 ID Number: 12

Policy Start Date: 13 Policy End Date: 14

Policy Limits: 15 16 DED: 17

UM/SUM Policy Limits: 18 19 DED: 20

Self Insured Amount: 21 100% 22

Insurance Limit By Multiple Plaintiff 23 Carrier Has Lien? 24

Comments:

I 25

Add to Total Coverage 26 MV Leased: 27

Available Coverage Amount: 28

Authentication to Defense Counsel 30

Third Party Administrator / Adjusting Company

Organization: 31

Adjuster: 32

Claim Number: 33

Created at 4/5/2019 10:41:00 AM by De Jesus, Lourdes.
Save
Cancel

1. Plaintiff: The plaintiff covered by the policy.

2. Insurance Company: The insurance company providing the coverage.
3. Primary: Checkbox that indicates whether the policy is the plaintiff's primary insurance. No plaintiff can have more than one primary policy; if this field is selected when the policy is saved, it will automatically be deselected in every other policy covering the same plaintiff.
4. Insurance Type: The type of the insurance.
5. Include on the Case Summary: Checkbox to determine whether an insurance company that is not marked as Primary will be shown on the Case Summary page.
6. Adjuster: The insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. Multiple adjusters can be assigned to the case, one of which can be designated as Primary.
7. [Adjuster Table]: List of all adjusters assigned to the case. The adjuster designated as Primary will always be displayed first in the list.
8. Name of Insured: The named insured of the policy. If the Select from Plaintiffs and/or Select from Defendants checkbox in the dropdown is selected, the dropdown will only show the plaintiffs and/or the defendants in the case, respectively.
9. Policy Number: The identification number of the policy.
10. Claim Number: The identification number of the claim on the policy related to the case.
11. Group Number: The identification number of the group plan.
12. ID Number: The identification number of the plaintiff in the group plan.
13. Policy Start Date: The start date of the policy.
14. Policy End Date: The end date of the policy.
15. Policy Limits [Individual]: The maximum payment per individual event or injured person.
16. Policy Limits [Aggregate]: The maximum payment per policy period or across all injured people.
17. DED [general]: The deductible that applies to this insurance policy.
18. UM/SUM Policy Limits [Individual]: The maximum payment per injured person in accidents caused by an uninsured or underinsured driver.
19. UM/SUM Policy Limits [Aggregate]: The maximum payment across all injured people in accidents caused by an uninsured or underinsured driver.
20. DED [UM/SUM]: The deductible that applies to the UM/SUM coverage under this insurance policy.
21. Self Insured Amount: The amount that must be paid by the insured before the insurer pays anything.
22. 100%: If checked, the policy is entirely self-insured.
23. Insurance Limit By Multiple Plaintiff: Whether the aggregate policy limits refer to multiple injured individuals or multiple events.
24. Carrier Has Lien?: Whether the insurance company has a lien on the case to recover payments. If this field is selected when a new policy record is created, a lienor record will be created in the [Lien Tracking](#) case page with the insurance company listed as the lienor and the insurance type listed as the lienor type. This checkbox does not function when editing an existing insurance record, however (to avoid accidentally creating multiple liens from a single insurance record).
25. Comments: Any comments about the policy.
26. Add to Total Coverage: Whether the coverage available under this policy should be considered part of the total available coverage in the case. If this field is selected, the value of the Current Coverage Amount field is part of the sum listed in the Liability Coverage line in the [Case Summary](#) page.
27. MV Leased: Whether the vehicle covered by the policy is leased.
28. Available Coverage Amount: The amount of coverage currently available through this policy. Unless the Amount to be Added to Total Coverage field is selected, this field is uneditable.
29. Authentication to Defense Counsel [Checkbox]: Whether the insurance company has been authorized to release the policy information to defense counsel.
30. Authentication to Defense Counsel [Date]: When the insurance company was authorized to release the policy information to defense counsel. Unless the Authentication to Defense Counsel [Checkbox] field is selected, this field is uneditable.
31. Organization [TPA]: The organization serving as third-party administrator of the insurance policy.
32. Adjuster [TPA]: The third-party administrator's insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. When the selection in this field changes, the Phone Number [TPA] field is automatically set to the primary phone number of the selected adjuster.
33. Claim Number [TPA]: The third-party administrator's identification number for the claim on the policy related to the case.

Plaintiff Insurance Notes Table

The Notes table displays the details of notes that have the Plaintiff Insurance type. Each row of the table represents an individual note. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below. See the [Notes](#) case page for viewing notes of all types.

Columns in the Table

The Plaintiff Insurance Notes table contains the following available columns:

The screenshot shows the 'Plaintiff Insurance Notes' table interface. At the top, there are two buttons: 'Add New Note' (1) and 'Clear Filters' (2). Below these are search and filter controls. The table has columns for Date (3), Staff (4), Type (5), and Notes (6). A sample row shows a note from 'Dreier, Harry' on '4/4/2018 3:00 PM' with the text 'No-fault carrier will cover the medical bills.' To the right of the table are 'Export' (7) and 'Action' (8) buttons. At the bottom left, it says 'Page 1 of 1 (1 Items)' and at the bottom right, there is a 'Show/Hide Columns' button.

1. Add New Note button: Used to add new Plaintiff Insurance Note to the case file.
2. Clear Filters button: Used to clear any filters that have been placed in one or more columns.
3. Date: The date and time the note was created.
4. Staff: The staff member who created the note.
5. Type: The note's type.
6. Notes: The content of the note, including formatting.
7. [Priority]: The priority level of the note.
8. Action: A Right-click icon; the right-click menu contains Edit, Delete, Email, Print, Email and Copy.

? Unknown Attachment

Editing a Note

To edit a note:

1. Click the [right-click icon](#) in the Action column of the row representing the note you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for notes, with the existing information filled in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Emailing a Note

1. To email a note:
 2. Click the [right-click icon](#) in the Action column of the row representing the note you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Email option in the menu. This will open the Case Email panel with the note's creator, date and time of creation, and content automatically entered in the body of the email.
 4. Fill out the email with any desired additional content.
 5. Click Send to send the email. The email will automatically be entered in the Document or Email page.
- If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Note

To print a note:

1. Click the [right-click icon](#) in the Action column of the row representing the note you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Print option in the menu. This will open a new tab containing the details of the note, and immediately bring up your browser's print options for that tab.
 3. The details of the note include the number, name, type and status of the case of which the note is part; the note's type and priority level; the date the note was created; the staff member who created the note; the date the note was modified; the staff member who modified the note; and the contents of the note.
 4. Select the print options you desire and print the note. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
- Note that after printing, the tab containing the note will remain open. You may close this if you wish.

Copying a Note

To copy a note:

1. Click the [right-click icon](#) in the Action column of the row representing the note you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
 2. Click the Copy option in the menu. This will bring up a panel allowing you to choose which case file to copy the note to. The panel contains a series of [Radio buttons](#) for the last ten cases you have visited (including the case the note is already in, in case you wish to put an additional copy of the note in the same file). It also includes a [Text input](#) field for a case number, in case you wish to copy the note to a case other than the ten listed.
 3. If you wish to copy the note to one of the last ten cases you have visited, click the radio button associated with that case. If you wish to copy the note to some other case, type that case's case number in the text input field instead.
 4. Click Copy to copy the note to the chosen case file.
- If you decide you do not wish to copy the note, click Cancel instead of clicking Copy to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Note

1. To delete a note:
 2. Click the [right-click icon](#) in the Action column of the row representing the note you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
 4. Click the OK button in the message to confirm the deletion.
- If you decide you do not wish to delete the note, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Note

To add a new note:

1. Click the Add New Note button. This will bring up The Add/Edit Note Panel with the Plaintiff Insurance type already selected.
2. The note type will still be editable; in theory, you could add any type of note starting from the Plaintiff Insurance page. However, it is generally better practice to use the Add Note icon for notes of types different than the type of note relating to the table you are currently in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Lien Tracking

The Lien tracking screen allows for the viewing and recording of liens in the case.

Structure of This Page

Total Liens Table

| * TRAIN23-A-00012 - Swanson, Todd (DECEASED) -v- Robinson, Terry-Ann | | Auto Accident (Rear End, Red Light) 3/24/2023 GA | | | | Attorney: Aleksandrov, Yury | |
|--|----------------------|--|-----------------|-------------------------|---------------------|-----------------------------|--|
| SEND TO LIEN RESOLUTION | | Totals | | | | | |
| Plaintiffs 1 | Unconfirmed 2 | Confirmed 3 | Waived 4 | Current Payoff 5 | Negotiated 6 | Paid 7 | |
| Swanson, Todd | \$25,000.00 | \$25,000.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | |
| | \$25,000.00 | \$25,000.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | |

At the top of this screen is a table that auto-calculates the totals of all liens entered in this case. The columns contain the following information:

1. Plaintiff associated with liens in the case
2. Unconfirmed lien amounts
3. Confirmed lien amounts
4. Waived lien amounts
5. Current Payoff amounts
6. Negotiated lien amounts
7. Paid lien amounts

Lienor Tracking Table

This table contains more specific information about the individual lienors in the case. The table includes the following information:

| ADD LIENOR | | Lien Tracking | | | | | Export | |
|--------------------|--|----------------------|-------------------------|--|-----------------|--------|--------|--|
| Plaintiff 1 | Lienor 2 | Lienor Type 3 | Recovery Agent 4 | Amounts 5 | File # 6 | Action | | |
| Swanson, Todd (D) | Georgia Department of Family and Children Services | Child Support | | Confirmed Gross: \$25,000.00 Current Payoff: \$0.00 | | | | |

1. Plaintiff associated with liens in the case
2. Name of lienor
3. Lienor type
4. Name of recovery agent
5. Amount of lien: Lists the unconfirmed and confirmed lien amounts along with the current payoff amount of the lien.
6. Lienor's file number

Adding a Lienor

By clicking the Add Lienor button, the following information can be indicated:

Edit Record ✕

| | | | |
|---|--|--|---|
| Plaintiff:* 1 | Swanson, Todd (D) ▾ | Lienor Type:* 2 | ▾ |
| Lienor: 3 | ▾ ... | | |
| Contact Person: 4 | ▾ ... | | |
| Recovery Agent: 5 | ▾ ... | | |
| Recovery Contact: 6 | ▾ ... | | |
| Unconfirmed Gross Amount: 7 | ▾ ^ | Confirmed Gross Amount: 8 | ▾ ^ |
| Current Payoff Amount: 9 | ▾ ^ | Date of Current Payoff Amount: 10 | ▾ ▾ |
| Negotiated/Final Lien Amount: 11 | ▾ ^ | Final: 12 | <input type="checkbox"/> ▾ |
| File #: 13 | ▾ | Negotiation Final Confirmation Date: 14 | ▾ ▾ |
| Policy Received: 15 | <input type="checkbox"/> | ERISA: 16 | <input type="checkbox"/> |
| First Notice Date: 17 | ▾ ▾ | Certified Mail: 18 | ▾ ▾ |
| Receipt Signed: 19 | ▾ ▾ | Date Paid: 20 | ▾ ▾ |
| Check Number: 21 | ▾ | Date Release Received: 22 | ▾ ▾ |

Comments:

Empty text box for comments.

23

SAVE SAVE & EDIT LIEN CANCEL

- 1. Plaintiff associated with this lienor
- 2. Lienor type
- 3. Lienor name: contact dropdown
- 4. Lienor contact name: contact dropdown
- 5. Recovery agency name: contact dropdown
- 6. Recovery agency contact name: contact dropdown
- 7. Unconfirmed gross lien amount
- 8. Confirmed gross lien amount
- 9. Current lien payoff amount
- 10. Date current payoff amount was provided
- 11. Negotiated/final lien amount
- 12. Indication that the lien amount has been finalized
- 13. Lienor file number
- 14. Date final lien amount negotiated
- 15. Indication that the lienor policy has been received
- 16. Indication of ERISA lienor
- 17. Date of first notice of the lien
- 18. Certified mail number
- 19. Date certified mail receipt is signed
- 20. Date lien was paid
- 21. Check number of lien payment
- 22. Date lien release was received
- 23. Additional comments regarding this lienor

Lien History Sub-Table

When a lienor has been added to the case, the lienor table can be expanded to reveal the lien sub-table which contains information regarding all liens associated with this lienor. The table includes the following information:

| Lien History | | | | | | | | | | | Export |
|--------------|-------------------|------------------|-----------------------|---------------|-------------|---|---|-------------------|-----------------|----------|--------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | |
| Date | Method of Service | Confirmed Amount | Confirmation Received | Lien Type | Firm Staff | Itemization | Notification | Service Date From | Service Date To | Comments | Action |
| 4/6/2023 | Overnight Mail | \$25,000.00 | 4/7/2023 | Child Support | Clark, Trei | Requested: 4/5/2023 Received: 4/6/2023 | Client Notified: 4/7/2023 Client Responded: 4/8/2023 | 4/3/2023 | 4/5/2023 | | |

- 1. Date of lien
- 2. Method of service of lien
- 3. Confirmed lien amount
- 4. Date lien confirmation was received
- 5. Lien type
- 6. Firm staff assigned to handle lien
- 7. Itemization information: lists dates of request and receipt of lien itemization
- 8. Notification information: Dates of client notification and client response
- 9. First date of service associated with this lien
- 10. Last date of service associated with this lien
- 11. Comments associated with this lien

Adding a Lien

By clicking the Add Lien button, the following information can be indicated:

Edit Record

Date: 1

Lien Type: 3

Service Date From: 5

Unconfirmed Amount: 7

Confirmed Amount: 9

Confirmed: 2

Firm Staff: 4

Service Date To: 6

Itemization Requested: 8

Itemization Received: 10

Confirmation Received: **11** Client Notified: **12**

Method of Service: **13** Client Responded: **14**

Waived: **15** Don't Pay at Settlement: **16**

Comments: **17**

Related Documents: **18**

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |

1. Date of lien
2. Indication of confirmed lien
3. Lien type
4. Firm staff assigned to handle lien
5. First date of service associated with this lien
6. Last date of service associated with this lien
7. Unconfirmed lien amount
8. Date lien itemization was requested
9. Confirmed lien amount
10. Date lien itemization was received
11. Date confirmation of lien amount was received
12. Date client was notified about the lien
13. Method of service of lien
14. Date client responded to lien notification
15. Indication of lien being waived
16. Indication that lien should not be paid at settlement
17. Comments associated with this lien
18. The ability to attach a document to this case and lien entry

How to Update Lien Information

Medical Chronology

This page is currently under construction. Check back for updates!





Medical Providers

The Medical Providers screen allows for the viewing and recording of medical providers, medical visits, medical bills and medical payments in the case. This page also provides the opportunity to generate and track medical record requests.

Structure of This Page

Medical Providers Table

The medical providers table lists information for all medical providers associated with the case. The information included in this table includes:

| Medical Providers | | | | | | | | | | | | | Export    | |
|--------------------------|--------------------------|-------------------|---------------------|---------------------|-------------------|----------------|---------------------|-------------------------|----------------------------|-------------------|---------------------------|--------------------|--|--|
| <input type="checkbox"/> | Plaintiff 1 | Provider 2 | Individual 3 | Start Date 4 | End Date 5 | Ended 6 | Total Bill 7 | Total Payments 8 | Total Adjustments 9 | Balance 10 | Bills Finalized 11 | Comments 12 | Action | |
| > | <input type="checkbox"/> | Swanson, Todd | Northside Hospital | 3/31/2023 | 4/2/2023 | | \$25,000.00 | \$1,000.00 | \$0.00 | \$24,000.00 | | |  | |
| | | | | | | | \$25,000.00 | \$1,000.00 | \$0.00 | \$24,000.00 | | | | |

1. Name of plaintiff associated with this medical provider
2. Name of medical provider/facility
3. Name of individual medical provider
4. First date of service associated with this medical provider
5. Last date of service associated with this medical provider
6. Indication that treatment with this medical provider has ended
7. Total amount of medical bills for this medical provider
8. Total amount of medical payments recorded for this medical provider
9. Total amount of medical adjustments recorded for this medical provider
10. Balance of medical bills for this medical provider
11. Indication that medical bills for this provider have been finalized
12. Comments associated with this medical provider

Adding a Medical Provider

By clicking the Add Medical Provider button, the following information can be indicated:

Add/Edit Medical Provider



Plaintiff:* **1**

Start Date: **3**

End Date: **5**

Hospital Chart/File #: **8**

Referred Date: **11**

Bills Finalized: **14**

Last Records Update: **17**

Provider:* **2**

Individual: **4**

Treatment ended: **6** Will Testify: **7**

Expert: **9** Total Visits: **10**

Is Referred: **12** Medical Records: **13**

Don't Pay at Settlement: **15** LOP: **16**

Comments: **18**

Related Documents: **ATTACH** **SELECT**

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |

SAVE
CANCEL

1. Name of plaintiff associated with this medical provider
2. Name of medical provider/facility
3. First date of service associated with this medical provider
4. Name of individual medical provider
5. Last date of service associated with this medical provider
6. Indication that treatment with this medical provider has ended
7. Indication that treating medical provider will testify in this case
8. Medical provider's chart or medical record file number
9. Indication that treating medical provider will serve as an expert in this case
10. Total number of treatment visits for this medical provider
11. Date client was referred to this medical provider
12. Indication that client was referred to this medical provider
13. General status of medical records for this medical provider
14. Indication that medical bills for this provider have been finalized
15. Indication that medical bills for this provider should not be paid at settlement of this case
16. Indication of Letter of Protection associated with this medical provider

1. Visit/Comments: Lists visit information associated with this medical bill
2. Medical bill number
3. Billing account number
4. Amount of bill
5. Negotiated amount of bill
6. Date bill was submitted
7. First date of service associated with this medical bill
8. Last date of service associated with this medical bill
9. Balance of this medical bill

Adding a Medical Bill

By clicking the Add New Bill button, the following information can be indicated:

Add/Edit Bill ✕

Associated Medical Visit: 1

Bill #: 2 Account #: 3

Bill Amount: 4 Negotiated Bill Amount: 5

Date From: 6 Date To: 7

Submit Date: 8

Comments: 9

SAVE
CANCEL

1. Selection of medical visit associated with this medical bill
2. Medical bill number
3. Billing account number
4. Amount of bill
5. Negotiated amount of bill
6. First date of service associated with this medical bill
7. Last date of service associated with this medical bill
8. Date bill was submitted
9. Comments associated with this medical bill

Payment/Adjustment Sub-Table

The payment/adjustment sub-table lists information for all medical payments and adjustments associated with this medical provider. The information included in this table includes:

| ADD PAYMENT/ADJUSTMENT | | | | | | | | | Payment/Adjustment | |
|------------------------------------|----------------------|-----------|---------|------------|------------|------------|----------|--|--------------------|--|
| Associated Medical Bill | Claim Submitted Date | Paid Date | Paid By | Collateral | Amount | Adjustment | Comments | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | | | |
| Bill#:12345 (3/31/2023 - 4/2/2023) | | | GEICO | Med Pay | \$1,000.00 | | | | 🔒 | |

1. Information regarding the medical bill associated with this medical payment/adjustment
2. Date claim was submitted
3. Date payment/adjustment was made
4. Payee
5. Collateral source of medical payment/adjustment
6. Amount of payment/adjustment
7. Indication of adjustment
8. Comments associated with this medical payment/adjustment

Adding a Medical Payment/Adjustment

By clicking the Add Payment/Adjustment button, the following information can be indicated:

Add/Edit Amount Paid ✕

Associated Medical Bill:* 1

Collateral:* 2

Claim Submitted Date: _/_/___ 3

Paid/Adjusted Date: _/_/___ 4

Paid/Adjusted By:* 5

Amount:* 6 Adjustment: 7

Comments: 8

SAVE
CANCEL

1. Selection of medical bill associated with this medical payment/adjustment
2. Collateral source of medical payment/adjustment
3. Date claim was submitted
4. Date payment/adjustment was made
5. Payee
6. Amount of payment/adjustment
7. Indication of adjustment
8. Comments associated with this medical payment/adjustment

Medical Requests Table

The medical requests table lists information for all medical record requests associated with this case. The information included in this table includes:

| ADD MEDICAL REQUEST | | | | | | | | | | | | | 13 <input type="checkbox"/> Show Active Requests Only | | Export |
|---------------------|--|---|---|---|---|---|---|--|--|---|--|--|---|--|--------|
| Medical Requests | | | | | | | | | | | | | | | |
| ! | Plaintiff ▾ | Provider ▾ | Request Date ▾ | Requested By ▾ | From ▾ | To ▾ | Request Info ▾ | Assigned To ▾ | Completed ▾ | Status ▾ | Status Date ▾ | FollowUp Date ▾ | Action | | |
| 1 | Swanson, Todd | Northside Hospital | 4/5/2023 | Clark, Trei | 3/24/2023 | 4/5/2023 | Hospital Records - No Fault requested from 3/24/2023 to 4/5/2023 by Clark, Trei , assigned to Clark, Trei | Clark, Trei | _/_/___ | External | 4/6/2023 | 5/5/2023 | | | |

1. Name of plaintiff associated with this medical record request
2. Name of medical provider associated with this medical record request
3. Date of medical record request
4. Staff member making the medical record request
5. First date of service associated with this medical record request
6. Last date of service associated with this medical record request
7. Information about this medical record request: lists type of medical record requests, dates of service covered by this medical record request, and staff member assigned to follow up on this request
8. Staff member assigned to follow up on this request
9. Date request was completed
10. Status of the request
11. Date associated with the status of the request
12. Date of next follow up on request

Adding a Medical Request

By clicking the Add Medical Request button, the following information can be indicated:

Add/Edit Medical Request



| | | | |
|-------------------------|--|---|---|
| Plaintiff:* 1 | <input type="text" value="Swanson, Todd (D)"/> | Provider:* 2 | <input type="text"/> |
| Request Date: 3 | <input type="text" value="04/06/2023"/> | Assigned To*: 4 | <input type="text"/> <input checked="" type="checkbox"/> Send Email |
| From: 5 | <input type="text" value="03/24/2023"/> | Select all dates: <input type="checkbox"/> 6 | |
| To: 7 | <input type="text" value="04/06/2023"/> | Until Today: <input type="checkbox"/> 8 | <input type="checkbox"/> Order Affidavit |
| FollowUp Date: 9 | <input type="text" value="__/__/__"/> | Record Type:* 10 | <input type="text"/> |
| Priority: 11 | <input type="text" value="Normal"/> | Status: 12 | <input type="text" value="Internal"/> |
| Status Date: 13 | <input type="text" value="__/__/__"/> | Requested By:* 14 | <input type="text" value="Clark, Trei"/> |

Comments:

Provider Notes:

Related Documents:

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |

1. Name of plaintiff associated with this medical record request
2. Name of medical provider associated with this medical record request
3. Date of medical record request
4. Staff member assigned to follow up on this request
5. First date of service associated with this medical record request
6. Indication that the request is to cover all dates of service
7. Last date of service associated with this medical record request
8. Indication that the request is to cover all dates between the first date of service through the date of the request
9. Date of next follow up on request
10. Type of medical record request
11. Priority level of medical record request
12. Status of the request
13. Date associated with the status of the request
14. Staff member making the medical record request

Medical Providers- Prior

This page is currently under construction. Check back for updates!

Other Providers

The Other Providers screen allows for the viewing and recording of other providers, bills and payments in the case.

Structure of This Page

Other Providers Table

The other providers table lists information for all other service providers associated with this case. The information included in this table includes:

| Other Providers | | | | | | | | Export |
|-----------------|---|------------------|-----------------|---------------|--------|-------------|----------|--------|
| Plaintiff | Provider Name | Provider Type | Treatment Start | Treatment End | Visits | Total Bill | Comments | Action |
| Swanson, Todd | Northside Hospital Phone: (404) 851-8000 | Home Health Care | 4/3/2023 | 4/5/2023 | 2 | \$15,000.00 | | |

1. Name of plaintiff associated with this service provider
2. Name of service provider
3. Type of service provider
4. First date of service associated with this provider
5. Last date of service associated with this provider
6. Number of service visits with this provider
7. Total bill amount for the provider
8. Comments associated with this service provider

Adding a Provider

By clicking the Add Other Provider button, the following information can be indicated:

Edit Provider

Plaintiff* **1**

Provider Name* **2**

Contact Name **3**

Provider Type **4** Visits **5**

Treatment Start* **6** Treatment End **7**

Comments **8**

1. Name of plaintiff associated with this provider
2. Name of service provider
3. Name of contact at service provider's office/facility
4. Type of provider
5. Number of visits to/by this provider
6. First date of service associated with this provider
7. Last date of service associated with this provider
8. Comments associated with this service provider

Bills Sub-Table

The bills sub-table lists information for all bills associated with this service provider. The information included in this table includes:

| Bill Details | | | | | | | | | |
|--------------|-----------|-------------|------------------------|-------------|-----------|----------|----------------|----------|--------|
| Bill # | Account # | Bill Amount | Negotiated Bill Amount | Submit date | Date From | Date To | Balance Amount | Comments | Action |
| 12345 | | \$15,000.00 | | | 4/3/2023 | 4/5/2023 | \$14,500.00 | | |

1. Bill number
2. Billing account number
3. Amount of bill
4. Negotiated amount of bill
5. Date bill was submitted
6. First date of service associated with this medical bill
7. Last date of service associated with this medical bill
8. Balance of this medical bill
9. Comments associated with this bill

Adding a Bill

By clicking the Add Bill Details button, the following information can be indicated:

Add Bill Details ✕

| | | | |
|--|----------------------|---------------------------------|----------------------|
| Bill # 1 | <input type="text"/> | Account # 2 | <input type="text"/> |
| Bill Amount* 3 | <input type="text"/> | Negotiated Bill Amount 4 | <input type="text"/> |
| Date From 5 | <input type="text"/> | Date To 6 | <input type="text"/> |
| Submit date 7 | <input type="text"/> | | |
| Comments 8 | | | |
| <div style="display: flex; justify-content: space-around;"> SAVE CANCEL </div> | | | |

1. Bill number
2. Billing account number
3. Amount of bill
4. Negotiated amount of bill
5. First date of service associated with this bill
6. Last date of service associated with this bill
7. Date bill was submitted
8. Comments associated with this bill

Payment/Adjustment Sub-Table

The payment/adjustment sub-table lists information for all payments and adjustments associated with this service provider. The information included in this table includes:

| ADD PAYMENT/ADJUSTMENT | | | | | | | | |
|-----------------------------------|-------------------------------|-----------------------------|---------------------------|---------------------|----------------------|---------------------|-------------------|--------|
| Payment/Adjustment | | | | | | | | |
| Associated Bill 1 | Claim Submitted Date 2 | Paid/Adjusted Date 3 | Paid/Adjusted By 4 | Collateral 5 | Paid Amount 6 | Adjustment 7 | Comments 8 | Action |
| Bill#:12345 (4/3/2023 - 4/5/2023) | | | GEICO | Med Pay | \$500.00 | | | 🗑️ |

1. Information regarding the bill associated with this payment/adjustment
2. Date claim was submitted
3. Date payment/adjustment was made
4. Payee
5. Collateral source of payment/adjustment
6. Amount of payment/adjustment
7. Indication of adjustment
8. Comments associated with this payment/adjustment

Adding a Payment/Adjustment

By clicking the Add Payment/Adjustment button, the following information can be indicated:

Add Amount Paid ✕

| | | |
|----------------------|---|---------------------------------------|
| Associated Bill* | 1 | <input type="text"/> |
| Collateral* | 2 | <input type="text"/> |
| Claim Submitted Date | 3 | <input type="text"/> |
| Paid/Adjusted Date | 4 | <input type="text"/> |
| Paid/Adjusted By* | 5 | <input type="text"/> |
| Paid Amount* | 6 | <input type="text"/> |
| | | Adjustment <input type="checkbox"/> 7 |
| Comments | | <input type="text"/> |

8

SAVE **CANCEL**

1. Selection of bill associated with this payment/adjustment
2. Collateral source of payment/adjustment
3. Date claim was submitted
4. Date payment/adjustment was made
5. Payee
6. Amount of payment/adjustment
7. Indication of adjustment
8. Comments associated with this medical payment/adjustment

Prescriptions

This page is currently under construction. Check back for updates!

Prior Claims

The Prior Claims screen allows for the viewing and recording of the plaintiff's prior personal injury claims.

Structure of This Page

Prior Claims Table

The prior claims table lists information for all prior claims associated with the plaintiffs in this case. The information included in this table includes:

| ADD PRIOR CLAIM | | | | | | | Prior Claims | | | Export | | |
|-----------------|-------------------|------|--------------|------------------|----------|--------|--------------|--|--|--------|--|--|
| Plaintiff | Coverage Type | Year | Claim Amount | Recovered Amount | Comments | Action | | | | | | |
| Swanson, Todd | Liability Primary | 2020 | \$10,000.00 | \$5,000.00 | | | | | | | | |

1. Name of plaintiff associated with this prior claim
2. Type of coverage associated with this prior claim
3. Year of prior claim
4. Prior claim amount
5. Recovered amount
6. Comments associated with this prior claim

Adding a Prior Claim

By clicking the Add Prior Claim button, the following information can be indicated:

Edit Record ✕

Plaintiff:* **1** Recovery: **2**

Coverage Type:* **3** Recovered Amount: **4**

Year: Claim Amount: **6**

Comments: **7**

SAVE **CANCEL**

1. Name of plaintiff associated with this prior claim
2. Indication of recovery in the prior claim
3. Type of coverage associated with this prior claim
4. Recovered amount
5. Year of prior claim
6. Prior claim amount
7. Comments associated with this prior claim

School/Other Activities

The School/Other Activities screen allows for the viewing and recording of academic and recreational activities for the plaintiffs in the case.

Structure of This Page

School Table

The school table lists information for all schools associated with the case. The information included in this table includes:

| School | | | | | | | | | | Export |
|----------------|--------------------------|---------------------|----------|----------|----------|------------------------------|-----------------------------|-------------|--------|--------|
| Plaintiff Name | School | Contact Person Name | From | To | Grade | School Verif. Requested Date | School Verif. Received Date | Lost Amount | Action | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | |
| Swanson, Todd | Georgia State University | | 4/3/2023 | 4/5/2023 | College | 4/3/2023 | 4/20/2023 | \$18,000.00 | | |

Page 1 of 1 (1 items) < **1** > **LAYOUT**

1. Name of plaintiff associated with this school
2. Name of school
3. Name of contact person at the school
4. First date of attendance at school
5. Last date of attendance at school
6. Grade
7. Date verification was requested from school
8. Date verification was received from school
9. Amount of loss

Adding a School

By clicking the Add School button, the following information can be indicated:

Add/Edit School ✕

Plaintiff Name:* **1** Grade: **2**

School:* **3**

Contact Person Name: **4**

From: **5** To: **6**

MD Conf. Req. Date: **7** MD Conf. Date: **8**

School Verif. Requested Date: **9** School Verif. Received Date: **10**

Lost Amount: **11** Limited?: **12**

Comments: **13**

Auth. to Defense Counsel: **14** Auth. to Defense Counsel Date: **15**

UPDATE **CANCEL**

1. Name of plaintiff associated with this school
2. Grade
3. Name of school
4. Name of contact person at the school
5. First date of attendance at school
6. Last date of attendance at school
7. Date confirmation was requested from medical provider
8. Date confirmation was received from medical provider
9. Date verification was requested from school
10. Date verification was received from school
11. Amount of loss
12. Indication if recovery is limited
13. Comments associated with this school
14. Indication that authorization has been sent to defense counsel
15. Date authorization was sent to defense counsel

Other Activity Table

The other activity table lists information for all recreational activities associated with the plaintiffs in case. The information included in this table includes:

| Other Activity | | | | | | | | | | Export |
|----------------|--------------------------------|---------------------|----------|-----------|----------------|--------------------------------|-------------------------------|-------------|--------|--------|
| Plaintiff Name | Organization | Contact Person Name | From | To | Other Activity | Activity Verif. Requested Date | Activity Verif. Received Date | Lost Amount | Action | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | | |
| Swanson, Todd | North Atlanta School of Ballet | | 4/2/2023 | 4/28/2023 | Dance Lesson | 4/3/2023 | 4/6/2023 | \$500.00 | | |

Page 1 of 1 (1 items) < 1 > LAYOUT

1. Name of plaintiff associated with this activity
2. Name of activity facility
3. Name of contact person at the activity facility
4. First date of participation in activity
5. Last date of participation in activity
6. Activity description
7. Date verification was requested from activity facility
8. Date verification was received from activity facility
9. Amount of loss

Adding an Activity

By clicking the Add Other Activity button, the following information can be indicated:

Add/Edit Other Activity ✕

Plaintiff Name:* **1** Other Activity: **2**

Organization:* **3**

Contact Person Name: **4**

From: **5** To: **6**

MD Conf. Req. Date: **7** MD Conf. Date: **8**

Activity Verif. Requested Date: **9** Activity Verif. Received Date: **10**

Lost Amount: **11** Limited?: **12**

Comments: **13**

Auth. to Defense Counsel: **14** Auth. to Defense Counsel Date: **15**

UPDATE **CANCEL**

1. Name of plaintiff associated with this activity
2. Type of activity
3. Name of activity organization
4. Name of contact person at the activity facility
5. First date of participation in activity
6. Last date of participation in activity
7. Date confirmation was requested from medical provider
8. Date confirmation was received from medical provider
9. Date verification was requested from activity facility
10. Date verification was received from activity facility
11. Amount of loss
12. Indication if recovery is limited
13. Comments associated with this school
14. Indication that authorization has been sent to defense counsel
15. Date authorization was sent to defense counsel

Special Damages

This page is currently under construction. Check back for updates!
The Special Damages Tab

Vehicles

This page is currently under construction. Check back for updates!
Defendant

Defendant Summary

The Defendant Summary page allows you to view and manage the information from the [Defendant Insurance](#) and [Defendant Attorneys](#) case pages, and to view the defendant-centric SOLs from the [Critical Deadlines](#) case page. It also allows you to view and manage the defendants' roles and inclusion in the case. Managing defendants' insurance and attorneys can be done either on this page or the respective specialized case pages; the Defendant Summary page simply collects those functions in a single place. By contrast, adding or removing defendants after the case is created can only be performed on this page.

The Structure of This Page

Note: The Add Insurance Company button, Insurance Companies table, Add Law Firm button, Law Firms table, and SOLs table are all associated with an individual row of the Defendants table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Defendant Summary page, and where in the Defendants table they appear, will depend on which row, if any, of the Defendants table is set to display subtables. See [Subtables and the Open/Closed Column](#).



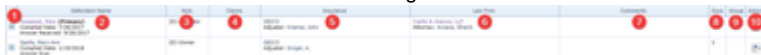
1. Add Defendant button. Used to add a new defendant to the case file. See [Adding a Defendant](#).
2. Defendants table. Contains the defendant details and allows various actions to be performed on them. See [Defendants Table](#).
3. Add Insurance Company button. Used to add a new insurance policy to the case file. See [Adding an Insurance Policy](#).
4. Insurance Companies table. Contains the insurance policy details and allows various actions to be performed on them. See [Insurance Companies Table](#).
5. Add Law Firm button. Used to add a new law firm to the case file. See [Adding a Law Firm](#).
6. Law Firms table. Contains the attorney details and allows various actions to be performed on them. See [Law Firms Table](#).
7. Add Defendant SOL button: Used to add a new defendant SOL to the case file. See [Adding an SOL](#).
8. SOLs table. Contains the details of defendant-centric SOLs. See [SOLs Table](#).
9. Add Non-Party Contacts (Defendants): Used to add a new individual connected to the case but not named as a defendant or other party to the case file. See [Adding a Non-Party Contacts \(Defendants\)](#).
10. Non-Party Contacts table (Defendants): Contains the details of non-party individuals and allows various actions to be performed on them. See [Non-Party Contacts Table \(Defendants\)](#).



Defendants Table

The Defendants table is where the details of defendants are stored. Each row of the table represents an individual defendant. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Defendants table contains the following columns:



1. [column with no title]: A plus sign  in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Insurance Companies, Law firms, and SOLs for that defendant). Clicking on the plus sign opens the subtables for that defendant. The plus sign then turns into a negative sign  which, when clicked, closes the subtable.
2. Defendant Name: The defendant in the case, whether the defendant is the primary one in the case, the SOL deadline or date of compliance, and the answer due or received date.
3. Role: The defendant's role in the inciting incident of the case.
4. Claims: Whether the defendant has initiated a counter-claim or a third-party claim in connection with the case.
5. Insurance: The insurance company and adjuster associated with the defendant's insurance policy.
6. Law Firm: The law firm and primary attorney representing the defendant.
7. Comments: Any comments about the defendant.
8. Docs: he number of documents associated with the defendant and a link to the documents in the [Documents](#) case page.
9. Group: The defendant group to which the defendant belongs.
10. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Delete, Add New Insurance Co., and Add New Law Firm.

Editing a Defendant

To edit a defendant:

1. Click the [right-click icon](#) in the untitled column of the row representing the defendant you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for defendants, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Defendant Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Defendant

To delete a defendant:

1. Make sure the defendant you wish to delete is not the primary defendant; if you attempt to delete the primary defendant, the SmartAdvocate system will display an error message instead of deleting the defendant. If the defendant you wish to delete is the primary defendant, you must edit that defendant and deselect the Primary [Checkbox](#), or edit another defendant and select that defendant as primary, to remove the primary designation from the defendant you wish to delete.
2. Click the [right-click icon](#) in the untitled column of the row representing the defendant you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
3. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
4. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the defendant, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Defendant

To add a new defendant:

1. Click the Add Defendant button. This will bring up an Add/Edit panel for defendants, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Defendant Panel](#) for details about the fields.
3. Click Save to save the defendant and close the panel.
 - If you decide you do not wish to save the defendant, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Removing a Defendant from the Case

You can remove a defendant from the case without deleting the defendant. This can prevent significant confusion and loss of data, since at the time of removal, there may be substantial information in the case file associated with the defendant. Summarily deleting this data would potentially destroy important information, while leaving it as-is may give a mistaken impression about the defendant's continued involvement in the case. Removing the defendant from the case, as opposed to deleting the defendant, maintains the data but crosses out information to clearly indicate that the defendant is no longer involved. To remove a defendant from the case, simply edit the defendant and select the Remove From Case checkbox. You cannot remove the primary defendant from the case; you must first designate another defendant as the primary defendant.

The Add/Edit Defendant Panel

The Add/Edit Defendant Panel allows you to fill in the details of a defendant. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Defendant: The defendant in the case.
2. Role: The defendant's role in the inciting incident of the case.
3. Order/Grouping: The defendant group to which the defendant belongs.
4. Primary: Whether the defendant is the primary defendant in the case.
5. Client: Whether your firm represents the defendant.
6. Remove from case: Whether the defendant has been released from the case.
7. Comments: Any comments about this defendant.

Insurance Companies Table

The Insurance Companies table contains the details of a defendant's insurance policies. It contains the same information as the [Insurance Companies Table](#) in the [Defendant Insurance](#) case page, but only for a single defendant. The Insurance Companies table is a subtable of the [Defendants Table](#), which means that each row of the Defendants table has an individual Insurance Companies table associated with it, which is specific to the defendant in that row; open a row of the Defendants table using the open/close icon to reveal the associated Insurance Companies table. Each row of the table represents an individual insurance policy. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Insurance Companies table contains the following available columns:

1. Insurance Company: The insurance company offering the policy and the company's address.
2. Insurance Type: The type of the insurance and whether it is the defendant's primary insurance.
3. Adjuster: The insurance adjuster for the policy and the adjuster's phone number.
4. Policy Info: The details of the policy (the named insured, the policy number, the policy dates, the claim number, and the policy limits).
5. 3rd Party Insurance: The details of the third-party administrator of the policy (the company administering the policy, the administrator's adjuster for the policy, the adjuster's phone number, and the claim number).
6. Comments: Any comments about the policy.
7. Docs: The number of documents associated with the policy and a link to the documents in the [Documents](#) case page.
8. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Copy, and Delete.

Editing an Insurance Policy

To edit an insurance policy:

1. Click the [right-click icon](#) in the untitled column of the row representing the policy you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Insurance Policy

To delete an insurance policy:

1. Click the [right-click icon](#) in the untitled column of the row representing the policy you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the policy, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Insurance Policy

To add a new insurance policy:

1. Click the Add Insurance Companies button. This will bring up an Add/Edit panel for insurance policies, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
3. Click Save to save the policy and close the panel.
 - If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying an Insurance Policy

You can add a new insurance policy by copying the information of an existing one. This can be useful if a policy applies to multiple defendants in the case, or if a defendant has multiple types of policies from the same insurer. To copy an insurance policy:

1. Click the [right-click icon](#) in the Action column of the row representing the policy you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for insurance policies, with the information from the policy being copied filled in.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the policy and close the panel.
 - If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Insurance Panel

The Add/Edit Insurance Panel allows you to fill in the details of an insurance policy. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:



1. Defendant: The defendant covered by the policy.
2. Insurance Company: The insurance company offering the policy.
3. Primary: Whether the policy is the defendant's primary insurance. No defendant can have more than one primary policy; if this field is selected when the policy is saved, it will automatically be deselected in every other policy covering the same defendant.
4. Insurance Type: The type of the insurance.
5. Adjuster: The insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters.
6. Name of Insured: The named insured of the policy. If the Select from Plaintiffs and/or Select from Defendants checkbox in the dropdown is selected, the dropdown will only show the plaintiffs and/or the defendants in the case, respectively.
7. Policy Number: The identification number of the policy.
8. Claim Number: The identification number of the claim on the policy related to the case.
9. Group Number: The identification number of the group plan.
10. ID Number: The identification number of the defendant in the plan.
11. Policy Start Date: The start date of the policy.
12. Policy End Date: The end date of the policy.
13. Policy Limits [Individual]: The maximum payment per individual event or injured person.
14. Policy Limits [Aggregate]: The maximum payment per policy period or across all injured people.
15. Comments: Any comments about the policy.
16. Amount to be Added to Total Coverage: Whether the coverage available under this policy should be considered part of the total available coverage in the case. If this field is selected, the value of the Current Coverage Amount field is part of the sum listed in the Liability Coverage line in the [Case Summary](#) page.
17. MV Leased: Whether the vehicle covered by the policy is leased.
18. Current Coverage Amount: The amount of coverage currently available through this policy. Unless the Amount to be Added to Total Coverage field is selected, this field is uneditable.
19. Organization [TPA]: The organization serving as third-party administrator of the insurance policy.
20. Adjuster [TPA]: The third-party administrator's insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. When the selection in this field changes, the Phone Number [TPA] field is automatically set to the primary phone number of the selected adjuster.
21. Phone Number [TPA]: The phone number of the third-party administrator's insurance adjuster.

22. Claim Number [TPA]: The third-party administrator's identification number for the claim on the policy related to the case.

Law Firms Table

The Law Firms table contains the details of a defendant's attorneys. It contains the same information as the [Attorneys Table](#) in the [Defendant Attorneys](#) case page, but only for a single defendant. The Law Firms table is a subtable of the [Defendants Table](#), which means that each row of the Defendants table has an individual Law Firms table associated with it, which is specific to the defendant in that row; open a row of the Defendants table using the open/close icon to reveal the associated Law Firms table. Each row of the table represents an individual law firm. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Law Firm table contains the following available columns:

1. Law Firm: the law firm representing the defendant, the address of the firm, and the type of representation.
2. Attorneys: The attorneys representing the defendant. The primary attorney is listed at the top, in bold text.
3. File No.: The law firm's identification number for the case file.
4. Insurance: The insurance company directly retaining the law firm, the adjuster for the insurance company, and the adjuster's phone number.
5. Comments: Any comments about the law firm.
6. Documents: The number of documents associated with the law firm and a link to the documents in the [Documents](#) case page.
7. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Copy, and Delete.

Editing a Law Firm

To edit a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for law firms, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Law Firm

To delete a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the law firm, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Law Firm

To add a new law firm:

1. Click the Add New Law Firm button. This will bring up an Add/Edit panel for law firms, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
3. Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying a Law Firm

You can add a new law firm by copying the information of an existing one. This can be useful if a firm represents multiple defendants in the case, or if a defendant is represented by multiple law firms or different attorneys at one firm for different aspects of the case. To copy a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for law firms, with the information from the firm being copied filled in.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Law Firm Panel

The Add/Edit Law Firm Panel allows you to fill in the details of a law firm. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Defendant: The defendant represented by the law firm. When adding a new law firm, this field is a Checkbox-select dropdown; when editing an existing firm, it is a **Dropdown**. As a dropdown, the field cannot be left blank; as a checkbox-select dropdown, leaving it blank is equivalent to selecting only the defendant associated with this subtable.
2. Law Firm: The law firm representing the defendant.
3. Type: The type of representation.
4. Attorney: The attorneys representing the defendant.
5. Paralegal: The paralegal associated with the defendant law firm.
6. File No: The law firm's identification number for the case file.
7. Insurance Co.: The insurance company directly retaining the law firm.
8. Comments: Any comments about the law firm.

SOLs Table

The SOLs table contains the details of statutes of limitations that govern actions directed at a particular defendant. It contains nearly all of the information found in the [Defendant Statutes of Limitation Table](#) in the [Critical Deadlines](#) case page, but only for a single defendant. The information in each column of the SOLs table comes from the column of the same title in the Defendant Statutes of Limitation table. The SOLs table is a subtable of the [Defendants Table](#), which means that each row of the Defendants table has an individual SOLs table associated with it, which is specific to the defendant in that row; open a row of the Defendants table using the open/close icon to reveal the associated SOLs table. Each row of the table represents an individual statute of limitations. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The SOLs table contains the following columns:



1. SOL: The details of the SOL (the deadline date, the SOL type, and the date of compliance).
2. Summons and Complaint: The details of the summons and complaint (the filing deadline for a summons and complaint, and the date the summons and complaint was filed).
3. Service: The details of serving the summons and complaint (the deadline to serve the summons and complaint, the date the summons and complaint was delivered to a process server, and the date the summons and complaint was served).
4. Answer: The details of the answer (the deadline for the defendant to serve an answer, and the date the answer was received).
5. Comments: Any comments about the statute of limitations and subsequent deadlines.

Non-Party Contacts (Defendants) Table

The Non-Party Contacts (Defendants) table is where the details of individuals in the case who act on behalf of a defendant, but are not themselves named in the case, are stored. Each row of the table represents an individual Non-Party Contact. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Non-Party Contacts table contains the following columns:

? Unknown Attachment

1. Non-Party Contacts: The name of the Non-Party Contacts.
2. Defendant: The defendant on whose behalf the Non-Party Contacts is acting.
3. Comment: Any comments about the Non-Party Contacts.
4. Action: [Action](#) icon; the menu contains Edit and Delete.

Editing a Non-Party Contacts

To edit a Non-Party Contact:

1. Click the [Edit icon](#) in the Action column of the row representing the party you wish to edit. This will bring up an Add/Edit panel for non-party contacts, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Non-Party Contacts \(Defendant\) Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Non-Party Contacts

To delete a Non-Party Contacts:

1. Click the [Delete icon](#) in the Action column of the row representing the party you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.

- If you decide you do not wish to delete the party, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Non-Party Contacts

To add a new Non-Party Contacts:

1. Click the Add Non-Party Contacts button. This will bring up an Add/Edit panel for non-plaintiff parties, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Non-Party Contacts Panel](#) for details about the fields.
3. Click Save to save the party and close the panel.
 - If you decide you do not wish to save the party, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Non-Party Contacts (Defendants) Panel

The Add/Edit Non-Party Contacts (Defendants) Panel allows you to fill in the details of a Non-Party Contacts. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

? Unknown Attachment

1. Non-Party Contacts: The name of the Non-Party Contacts.
2. Defendant: The defendant on whose behalf the Non-Party Contacts is acting.
3. Comment: Any comments about the Non-Party Contacts.

Defendant Attorneys

The Defendant Attorneys page allows you to view and record the details of defendants' attorneys.

The Structure of This Page

| Defendant | Law Firm | Attorneys | Paralegals | File No. | Insurance | Comments | Docs | Action |
|-------------------|---|----------------------------|--------------|----------|---|----------|------|--------|
| Bunker, Archibald | Premier Defense, LLC 123-321 Broadway Suite 321 New York, NY 10010 Phone: (212) 555-1212 Type: Defense attorney Primary | Santuchi, Anthony A., Esq. | Smith, Bryan | | Progressive Casualty Insurance Adjuster: John Doe Phone: (800) 274-6899 | | 0 | |

1. Add New Law Firm button. Used to add a new law firm to the case file. See [Adding a Law Firm](#).
2. Attorneys table. Contains the attorney details and allows various actions to be performed on them. See [Attorneys Table](#).

Attorneys Table

The Attorneys table is where the details of defendants' attorneys are stored. Each row of the table represents an individual law firm. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Attorneys table contains the following available columns:

| Law Firm 1 | Attorneys 2 | File No. 3 | Insurance 4 | Comments 5 | Documents 6 | Action 7 |
|---|----------------------------|-------------------|--------------------------------|-------------------|--------------------|-----------------|
| Premier Defense, LLC 123-321 Broadway Suite 321 New York, NY 10010 Phone: (212) 555-1212 Type: Defense Attorney Primary | Santuchi, Anthony A., Esq. | | Progressive Casualty Insurance | | 0 | |

1. Defendant: The defendant represented by the law firm.
2. Law Firm: The law firm representing the defendant, the address of the firm, and the type of representation.
3. Attorneys: The attorneys representing the defendant. The primary attorney is listed at the top, in bold text.
4. Paralegals: The paralegals assigned to the case. The primary paralegal is listed at the top, in bold text.
5. File No.: The law firm's identification number for the case file.
6. Insurance: The insurance company directly retaining the law firm, the adjuster for the insurance company, and the adjuster's phone number.
7. Comments: Any comments about the law firm.
8. Docs: The number of documents associated with the law firm and a link to the documents in the [Documents](#) case page.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Copy, and Delete.

Editing a Law Firm

To edit a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for law firms, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Law Firm Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Law Firm

To delete a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the law firm, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Law Firm

To add a new law firm:

1. Click the Add New Law Firm button. This will bring up an Add/Edit panel for law firms, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Law Firm Panel](#) for details about the fields.
3. Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying a Law Firm

You can add a new law firm by copying the information of an existing one. This can be useful if a firm represents multiple defendants in the case, or if a defendant is represented by multiple law firms or different attorneys at one firm for different aspects of the case. To copy a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for law firms, with the information from the firm being copied filled in.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Law Firm Panel](#) for details about the fields.
4. Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Law Firm Panel

The Add/Edit Law Firm Panel allows you to fill in the details of a law firm. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The image shows a screenshot of a web application panel titled "Add Law Firm". The panel contains several sections with dropdown menus and input fields. The "Defendant" section has a dropdown menu with a red "1" next to it. The "Law Firm" section has a dropdown menu with a red "2" next to it. The "Type" section has a dropdown menu with a red "4" next to it. The "Attorney" section has a dropdown menu with a red "5" next to it, and below it is a table with columns "Primary" and "Attorney Name", and a "No data to display" message. The "Paralegal" section has a dropdown menu with a red "6" next to it, and below it is a table with columns "Primary" and "Paralegal Name", and a "No data to display" message. The "Phone" section has a text input field with a red "7" next to it. The "Insurance Co." section has a dropdown menu with a red "8" next to it. The "Comments" section has a text input field with a red "9" next to it. At the bottom right of the panel are "Save" and "Cancel" buttons.

1. Defendant: The defendant represented by the law firm.
2. Law Firm: The law firm representing the defendant.
3. Primary: Whether the law firm is primary.
4. Type: The type of representation.
5. Attorney: The attorneys representing the defendant. This field allows multiple attorneys to be selected; click the Add hypertext in the dropdown to select an attorney, and it will appear in the table below the dropdown. Click the Delete hypertext in the table to remove an attorney. If there is a contact in the Law Firm field, the dropdown will only show attorneys employed by that contact; click the Show All button to make the dropdown show all attorneys, then click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the law firm.
6. Paralegal: The assigned to the case. This field allows multiple paralegals to be selected; click the Add hypertext in the dropdown to select a paralegal, and he or she will appear in the table below the dropdown. Click the Delete hypertext in the table to remove a paralegal. If there is a

- contact in the Law Firm field, the dropdown will only show paralegals employed by that contact; click the Show All button to make the dropdown show all paralegals, then click the Show Only Firm's Paralegals button to go back to showing only paralegals employed by the law firm.
7. File No: The law firm's identification number for the case file.
 8. Insurance Co.: The insurance company directly retaining the law firm.
 9. Comments: Any comments about the law firm.

Vehicles

The Defendant Vehicles page allows you to view and record the details of defendants' vehicles that are relevant to the case.

The Structure of This Page



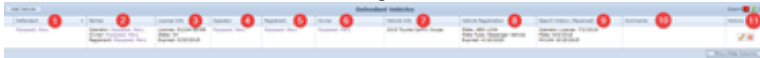
1. Add Vehicle button. Used to add a new vehicle to the case file. See [Adding a Vehicle](#).
2. Vehicles table. Contains the vehicle details and allows various actions to be performed on them. See [Vehicles Table](#).

Vehicles Table

The Vehicles table is where the details of vehicles are stored. Each row of the table represents an individual vehicle. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Vehicles table contains the following available columns:



1. Defendant: The defendant connected to the vehicle.
2. Parties: The operator, owner, and registrant of the vehicle.
3. License Info: The operator's driver's license information (the license number, the license state, the expiration date of the license, and any restrictions on the license).
4. Operator: The operator of the vehicle.
5. Registrant: The registrant of the vehicle.
6. Owner: The owner of the vehicle.
7. Vehicle Info: The physical details of the vehicle (the model year, color, make, model, and body type).
8. Vehicle Registration: The legal details of the vehicle (the license plate number and type, the VIN, and the registration expiration date).
9. Search History (Received): The dates that various documents searched for in connection with the vehicle were received.
10. Comments: Any comments about the vehicle.
11. Actions: Actions Column; [Edit icon](#), [Delete icon](#)

Editing a Vehicle

To edit a vehicle:

1. Click the [right-click icon](#) in the Action column of the row representing the vehicle you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the vehicle you wish to edit. This will bring up an Add/Edit panel for vehicles, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for vehicles, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Vehicle Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Vehicle

To delete a vehicle:

1. Click the [right-click icon](#) in the Action column of the row representing the vehicle you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the vehicle you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the vehicle, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Vehicle

To add a new vehicle:

1. Click the Add Vehicle button. This will bring up an Add/Edit panel for vehicles, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Vehicle Panel](#) for details about the fields.
3. Click Save to save the vehicle and close the panel.
 - If you decide you do not wish to save the vehicle, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Vehicle Panel

The Add/Edit Vehicle Panel allows you to fill in the details of a vehicle. The information in this panel is divided into two tabs: Owner/Vehicle Info and Search History. The headings of the tabs are always visible in the upper left of the panel, but only one tab's contents are visible at a time; click the heading of the tab you wish to access to bring up that tab's information. See [Add/Edit Panels](#) for general information about panel structure and usage.

The Owner/Vehicle Info tab contains the following fields:



1. Defendant: The defendant connected to the vehicle.
2. Owner: The owner of the vehicle.
3. Pick From Case [Owner]: The owner of the vehicle. When the selection in this field changes, the Owner field is automatically set to the selection in this field. The selection in this field is ignored when saving changes to the panel.
4. Registrant: The registrant of the vehicle.
5. Pick From Case [Registrant]: The registrant of the vehicle. When the selection in this field changes, the Registrant field is automatically set to the selection in this field. The selection in this field is ignored when saving changes to the panel.
6. Operator: The operator of the vehicle.
7. Pick From Case [Operator]: The operator of the vehicle. When the selection in this field changes, the Operator field is automatically set to the selection in this field. The selection in this field is ignored when saving changes to the panel.
8. License #: The operator's driver's license number.
9. License state: The state that issued the operator's driver's license.
10. Restrictions: Any restrictions on the operator's driver's license.
11. Lic.Exp: The expiration date of the operator's driver's license.
12. Make: The make of the vehicle.
13. Model: The model of the vehicle.
14. Year: The model year of the vehicle.
15. Body Type: The body type of the vehicle.
16. Plate #: The license plate number of the vehicle.
17. Color: The color of the vehicle.
18. Plate Type: The type of the vehicle's license plate.
19. Vehicle State: The state in which the vehicle is registered.
20. VIN: The Vehicle Identification Number of the vehicle.
21. Reg.Exp: The expiration date of the vehicle's registration.
22. Lease: Whether the vehicle is leased.
23. Comment: Any comments about the vehicle.

The Search History tab contains the following fields:



1. Operator License History Search: Whether your firm has requested the operator's driving record.
2. Operator License History Requested Date: The date your firm requested the operator's driving record.
3. Operator License History Received Date: The date your firm received the operator's driving record.
4. Plate Search Search: Whether your firm has requested a search of the license plate number.
5. Plate Search Requested Date: The date your firm requested a search of the license plate number.
6. Plate Search Received Date: The date your firm received the results of the search of the license plate number.
7. Title Search Search: Whether your firm has requested a title search on the vehicle.
8. Title Search Requested Date: The date your firm requested a title search on the vehicle.
9. Title Search Received Date: The date your firm received the results of the title search on the vehicle.
10. MV104 Search: Whether your firm has requested a copy of the MV-104 accident report.
11. MV104 Requested Date: The date your firm requested a copy of the MV-104 accident report.
12. MV104 Received Date: The date your firm received a copy of the MV-104 accident report.

Defendant Insurance Notes Table

The Notes table displays the details of notes that have the Defendant Insurance type. Each row of the table represents an individual note. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below. See the [Notes](#) case

page for viewing notes of all types.

Columns in the Table

The Defendant Insurance Notes table contains the following available columns:

| Date | Staff | Type | Notes | | |
|-------------------|-------------|---------------------|--|--|--|
| 7/15/2018 8:08 AM | Drews, Mary | Defendant Insurance | This is a test Defendant's Insurance Note. | | |

The screenshot shows a table with columns: Date, Staff, Type, Notes, and an empty column. Red circles with numbers 1-6 point to: 1. Date column, 2. Staff column, 3. Type column, 4. Notes column, 5. The empty column, and 6. The 'Action' button in the top right corner of the table.

1. Date: The date and time the note was created.
2. Staff: The staff member who created the note.
3. Notes: The content of the note, including formatting.
4. [Priority]: The priority level of the note.
5. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Email, Print, Copy, and Delete.
6. Type: The note's type.

Editing a Note

To edit a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for notes, with the existing information filled in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Emailing a Note

To email a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Email option in the menu. This will open the Case Email panel with the note's creator, date and time of creation, and content automatically entered in the body of the email.
3. Fill out the email with any desired additional content.
4. Click Send to send the email.
 - If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Note

To print a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Print option in the menu. This will open a new tab containing the details of the note, and immediately bring up your browser's print options for that tab.
 - The details of the note include the number, name, type and status of the case the note is part of; the note's type and priority level; the date the note was created; the staff member who created the note; the date the note was modified; the staff member who modified the note; and the contents of the note.
3. Select the print options you desire and print the note. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing the note will remain open. You may close this if you wish.

Copying a Note

To copy a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up a panel allowing you to choose which case file to copy the note to. The panel contains a [Radio button](#) group for the last ten cases you have visited (including the case the note is already in, in case you wish to put an additional copy of the note in the same file). It also includes a [Text input](#) field for the case's case number, in case you wish to copy the note to a case other than the ten listed.
3. If you wish to copy the note to one of the last ten cases you have visited, click the radio button associated with that case. If you wish to copy the note to some other case, instead type that case's case number in the text input field.
4. Click Copy to copy the note to the chosen case file.
 - If you decide you do not wish to copy the note, click Cancel instead of clicking Copy to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Note

To delete a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the note, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Note

To add a new note:

1. Click the Add New Note button. This will bring up The Add/Edit Note Panel with the Defendant Insurance type already selected.

- The note type will still be editable; in theory, you could add any type of note starting from the Defendant Insurance page. However, it is generally better practice to use the Add Note icon for notes of arbitrary types.
2. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Defendant Notes

The Defendant Notes page provides a shortcut for viewing all notes with Defendant in the note type. It is identical to the [Notes](#) case page in every way, except that Defendant is automatically entered into the filter for the Type column when the page is opened. For all instructions on interacting with this page, see [Notes](#).

Defendant UDFs

The Defendant UDFs page contains all user-defined fields for the case's case type that have Defendant as their Screen value. It is used to store any information about the defendant that is not otherwise covered by some page in SmartAdvocate. See the [UDF Editor](#) page for creating and managing user-defined fields, for a description of the available field formats, and for an explanation of how user-defined fields are organized on this and other UDF pages.

Defendant Attorneys

The Defendant Attorneys page allows you to view and record the details of defendants' attorneys.

The Structure of This Page

| Defendant | Law Firm | Attorneys | Paralegals | File No. | Insurance | Comments | Docs | Action |
|-------------------|---|----------------------------|--------------|----------|---|----------|------|--------|
| Bunker, Archibald | Premier Defense, LLC 123-321 Broadway Suite 321 New York, NY 10010 Phone: (212) 555-1212 Type: Defense Attorney Primary | Santucci, Anthony A., Esq. | Smith, Bryan | | Progressive Casualty Insurance Adjuster: Johnson, Raymond Phone: (800) 274-4499 | | | |

1. Add New Law Firm button. Used to add a new law firm to the case file. See [Adding a Law Firm](#).
2. Attorneys table. Contains the attorney details and allows various actions to be performed on them. See [Attorneys Table](#).

Attorneys Table

The Attorneys table is where the details of defendants' attorneys are stored. Each row of the table represents an individual law firm. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Attorneys table contains the following available columns:

| Law Firm | Attorneys | File No. | Insurance | Comments | Documents | Action |
|---|----------------------------|----------|--------------------------------|----------|-----------|--------|
| Premier Defense, LLC 123-321 Broadway Suite 321 New York, NY 10010 Phone: (212) 555-1212 Type: Defense Attorney Primary | Santucci, Anthony A., Esq. | | Progressive Casualty Insurance | | | |

1. Defendant: The defendant represented by the law firm.
2. Law Firm: The law firm representing the defendant, the address of the firm, and the type of representation.
3. Attorneys: The attorneys representing the defendant. The primary attorney is listed at the top, in bold text.
4. Paralegals: The paralegals assigned to the case. The primary paralegal is listed at the top, in bold text.
5. File No: The law firm's identification number for the case file.
6. Insurance: The insurance company directly retaining the law firm, the adjuster for the insurance company, and the adjuster's phone number.
7. Comments: Any comments about the law firm.
8. Docs: The number of documents associated with the law firm and a link to the documents in the [Documents](#) case page.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Copy, and Delete.

Editing a Law Firm

To edit a law firm:

1. Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for law firms, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Law Firm Panel](#) for details about the fields.

- Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Law Firm

To delete a law firm:

- Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
- Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the law firm, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Law Firm

To add a new law firm:

- Click the Add New Law Firm button. This will bring up an Add/Edit panel for law firms, completely blank.
- Fill the fields in with your desired information. See [The Add/Edit Law Firm Panel](#) for details about the fields.
- Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying a Law Firm

You can add a new law firm by copying the information of an existing one. This can be useful if a firm represents multiple defendants in the case, or if a defendant is represented by multiple law firms or different attorneys at one firm for different aspects of the case. To copy a law firm:

- Click the [right-click icon](#) in the untitled column of the row representing the law firm you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
- Click the Copy option in the menu. This will bring up an Add/Edit panel for law firms, with the information from the firm being copied filled in.
- Make any changes necessary to the information in the fields. See [The Add/Edit Law Firm Panel](#) for details about the fields.
- Click Save to save the law firm and close the panel.
 - If you decide you do not wish to save the law firm, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Law Firm Panel

The Add/Edit Law Firm Panel allows you to fill in the details of a law firm. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

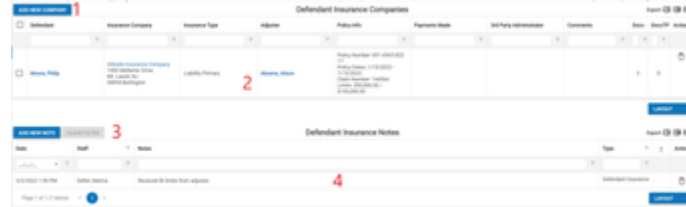
- Defendant: The defendant represented by the law firm.
- Law Firm: The law firm representing the defendant.
- Primary: Whether the law firm is primary.
- Type: The type of representation.
- Attorney: The attorneys representing the defendant. This field allows multiple attorneys to be selected; click the Add hypertext in the dropdown to select an attorney, and it will appear in the table below the dropdown. Click the Delete hypertext in the table to remove an attorney. If there is a contact in the Law Firm field, the dropdown will only show attorneys employed by that contact; click the Show All button to make the dropdown show all attorneys, then click the Show Only Firm's Attorney button to go back to showing only attorneys employed by the law firm.

6. Paralegal: The assigned to the case. This field allows multiple paralegals to be selected; click the Add hypertext in the dropdown to select a paralegal, and he or she will appear in the table below the dropdown. Click the Delete hypertext in the table to remove a paralegal. If there is a contact in the Law Firm field, the dropdown will only show paralegals employed by that contact; click the Show All button to make the dropdown show all paralegals, then click the Show Only Firm's Paralegals button to go back to showing only paralegals employed by the law firm.
7. File No: The law firm's identification number for the case file.
8. Insurance Co.: The insurance company directly retaining the law firm.
9. Comments: Any comments about the law firm.

Defendant Insurance

The Defendant Insurance page allows you to view and record the details of defendants' insurance policies that are relevant to the case.

The Structure of This Page



1. Add Insurance Companies button. Used to add a new insurance policy to the case file. See [Adding an Insurance Policy](#).
2. Insurance Companies table. Contains the insurance policy details and allows various actions to be performed on them. See [Insurance Companies Table](#).
3. Add New Note button. Used to add a new Defendant Insurance note to the case file. See [Adding a Note](#).
4. Defendant Insurance Notes table. Contains Defendant Insurance notes and allows various actions to be performed on them. See [Defendant Insurance Notes Table](#).

Insurance Companies Table

The Insurance Companies table is where the details of insurance policies are stored. Each row of the table represents an individual policy. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Insurance Companies table contains the following available columns:

| Defendant 1 | Insurance Company 2 | Insurance Type 3 | Adjuster 4 | Policy Info 5 | Payments Made 6 | 3rd Party Administrator 7 | Comments 8 | Docs 9 | DocsTP 10 | Action 11 | |
|--|--|-------------------|----------------|---|-----------------|---------------------------|------------|--------|-----------|-----------|--|
| <input type="checkbox"/> Moore, Philip | Abilene Insurance Company 1000 Midantic Drive Mt. Laurel, NJ 08054 Burlington | Liability Primary | Abrams, Alison | Policy Number: 851 65A5 822 17 Policy Dates: 1/15/2023 - 2/15/2023 Claim Number: 948564 Limits: \$50,000.00 / \$100,000.00 | | | | | 0 | 0 | |

1. Defendant: The defendant covered by the policy.
2. Insurance Company: The insurance company offering the policy and the company's address.
3. Insurance Type: The type of the insurance and whether it is the defendant's primary insurance.
4. Adjuster: The insurance adjuster for the policy and the adjuster's phone number.
5. Policy Info: The details of the policy (the named insured, the policy number, the policy dates, the claim number, and the policy limits).
6. Payments Made: A column summing all payments that have been made by that carrier as they are entered on other case screens (such as the [Medical Providers](#) screen).
7. 3rd Party Administrator: The details of the third-party administrator of the policy (the company administering the policy, the administrator's adjuster for the policy, the adjuster's phone number, and the claim number).
8. Comments: Any comments about the policy.
9. Docs: The number of documents associated with the policy and a link to the documents in the [Documents](#) case page.
10. Docs TP: The number of documents associated with the Third Party Administrator and a link to the documents in the [Documents](#) case page.
11. Action Column: [Right-click icon](#); right-click menu contains Edit, Copy, and Delete.

Editing an Insurance Policy

To edit an insurance policy:

1. Click the [right-click icon](#) in the untitled column of the row representing the policy you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for insurance policies, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Insurance Policy

To delete an insurance policy:

1. Click the [right-click icon](#) in the untitled column of the row representing the policy you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).

3. Click the OK button in the message to confirm the deletion.

- If you decide you do not wish to delete the policy, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Insurance Policy

To add a new insurance policy:

1. Click the Add Insurance Companies button. This will bring up an Add/Edit panel for insurance policies, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Insurance Panel](#) for details about the fields.
3. Click Save to save the policy and close the panel.
 - If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Copying an Insurance Policy

You can add a new insurance policy by copying the information of an existing one, even from a different case. This can be useful if a policy applies to multiple defendants in the case, if a defendant has multiple types of policies from the same insurer, or if the same policy covers one or several defendants in different cases. To copy an insurance policy:

1. Click the [right-click icon](#) in the Action column of the row representing the policy you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up an Add/Edit panel for insurance policies, with the information from the policy being copied filled in. One additional field is provided, "Copy to different case". By default, this field is set to the current case you are in, however you can choose any other case and copy the policy to that case.
3. Make any changes necessary to the information in the fields. See [The Add/Edit Insurance Panel](#) for details about the fields.
4. Click Save to save the policy and close the panel.
 - If you decide you do not wish to save the policy, click Cancel instead of clicking Save to undo the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Adding Defendant Insurance

The Add/Edit Insurance Panel allows you to fill in the details of an insurance policy. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel is essentially identical to the Add/Edit Plaintiff Insurance panel, with the exception of the UM/SUM fields, which are limited to the Plaintiff Insurance Panel. This panel contains the following fields:

Add Insurance ✕

Defendant:* **1**

Insurance Company:* **2** **3** Primary

Insurance Type:* **4** **5** Include on the Case Summary

Adjuster: **6**

| Primary | Adjuster Name | # | |
|---|--------------------------|---|--------|
| 7 <input checked="" type="radio"/> | 8 Williams, Wendy | | Delete |
| | | | |

Name of Insured: **9**

Policy Number: **10** Claim Number: **11**

Group Number: **12** ID Number: **13**

Policy Start Date: **14** Policy End Date: **15**

Policy Limits: **16** **17** DED: **18**

Comments:

19

20 Add to Total Coverage

MV Leased: 21

Available Coverage Amount: 22

Third Party Administrator / Adjusting Company

Organization: 23

Adjuster: 24

Claim Number: 25

SAVE CANCEL

1. Defendant: The defendant covered by the policy.
2. Insurance Company: The insurance company offering the policy.
3. Primary: Whether the policy is the defendant's primary insurance. No defendant can have more than one primary policy; if this field is selected when the policy is saved, it will automatically be deselected in every other policy covering the same defendant.
4. Insurance Type: The type of the insurance.
5. Include on the Case Summary: Checkbox to determine whether an insurance company that is not marked as Primary will be shown on the Case Summary page.
6. Adjuster: The insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. Multiple adjusters can be assigned to the case, one of which can be designated as Primary.
7. [Primary Adjuster Radio Button]: A radio button, that when marked, indicates that the selected adjuster is the primary adjuster on the policy.
8. [Adjuster Table]: List of all adjusters assigned to the case. The adjuster designated as Primary will always be displayed first in the list.
9. Name of Insured: The named insured of the policy. If the Select from Plaintiffs and/or Select from Defendants checkbox in the dropdown is selected, the dropdown will only show the plaintiffs and/or the defendants in the case, respectively.
10. Policy Number: The identification number of the policy.
11. Claim Number: The identification number of the claim on the policy related to the case.
12. Group Number: The identification number of the group plan.
13. ID Number: The identification number of the defendant in the plan.
14. Policy Start Date: The start date of the policy.
15. Policy End Date: The end date of the policy.
16. Policy Limits [Individual]: The maximum payment per individual event or injured person.
17. Policy Limits [Aggregate]: The maximum payment per policy period or across all injured people.
18. Comments: Any comments about the policy.
19. Add to Total Coverage: Whether the coverage available under this policy should be considered part of the total available coverage in the case. If this field is selected, the value of the Current Coverage Amount field is part of the sum listed in the Liability Coverage line in the Case Summary page.
20. MV Leased: Whether the vehicle covered by the policy is leased.
21. Available Coverage Amount: The amount of coverage currently available through this policy. Unless the Amount to be Added to Total Coverage field is selected, this field is uneditable.
22. Organization [TPA]: The organization serving as third-party administrator of the insurance policy.
23. Adjuster [TPA]: The third-party administrator's insurance adjuster for the policy. If the Show All checkbox in the dropdown is not selected, the dropdown will only show adjusters employed by the contact in the Insurance Company field; otherwise, the dropdown will show all adjusters. When the selection in this field changes, the Phone Number [TPA] field is automatically set to the primary phone number of the selected adjuster.
24. Claim Number [TPA]: The third-party administrator's identification number for the claim on the policy related to the case.

See related: [All Insurance](#)

Defendant Notes

The Defendant Notes page provides a shortcut for viewing all notes with Defendant in the note type. It is identical to the [Notes](#) case page in every way, except that Defendant is automatically entered into the filter for the Type column when the page is opened.


Defendant Insurance Notes Table

The Notes table displays the details of notes that have the Defendant Insurance type. Each row of the table represents an individual note. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below. See the [Notes](#) case page for viewing notes of all types.

Columns in the Table

The Defendant Insurance Notes table contains the following available columns:

| ADD NEW NOTE | | | | CLEAR FILTER | | | | Defendant Notes | | | |
|--------------|-------|------|------|--------------|--|--|--|-----------------|--|--|--|
| Date | Staff | Note | Type | Action | | | | | | | |
| 1 | 2 | 3 | 4 | 5 | | | | | | | |

| | | | | |
|-----------------------|-------------|-----------|-----------|---|
| | | | Defendant | |
| 3/17/2023 12:38 PM | Clark, Trei | Test Note | Defendant |  |

1. Date: The date and time the note was created.
2. Staff: The staff member who created the note.
3. Notes: The content of the note, including formatting.
4. [Priority]: The priority level of the note.
5. Type: The note's type
6. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Email, Print, Copy, and Delete.

Editing a Note

To edit a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for notes, with the existing information filled in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Emailing a Note

To email a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Email option in the menu. This will open the Case Email panel with the note's creator, date and time of creation, and content automatically entered in the body of the email.
3. Fill out the email with any desired additional content.
4. Click Send to send the email.
 - If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Note

To print a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Print option in the menu. This will open a new tab containing the details of the note, and immediately bring up your browser's print options for that tab.
 - The details of the note include the number, name, type and status of the case the note is part of; the note's type and priority level; the date the note was created; the staff member who created the note; the date the note was modified; the staff member who modified the note; and the contents of the note.
3. Select the print options you desire and print the note. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing the note will remain open. You may close this if you wish.

Copying a Note

To copy a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up a panel allowing you to choose which case file to copy the note to. The panel contains a [Radio button](#) group for the last ten cases you have visited (including the case the note is already in, in case you wish to put an additional copy of the note in the same file). It also includes a [Text input](#) field for the case's case number, in case you wish to copy the note to a case other than the ten listed.
3. If you wish to copy the note to one of the last ten cases you have visited, click the radio button associated with that case. If you wish to copy the note to some other case, instead type that case's case number in the text input field.
4. Click Copy to copy the note to the chosen case file.
 - If you decide you do not wish to copy the note, click Cancel instead of clicking Copy to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Note

To delete a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the note, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Note

To add a new note:

1. Click the Add New Note button. This will bring up The Add/Edit Note Panel with the Defendant Insurance type already selected.

- The note type will still be editable; in theory, you could add any type of note starting from the Defendant Insurance page. However, it is generally better practice to use the Add Note icon for notes of arbitrary types.
2. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Defendant Vehicles

This page is currently under construction. Check back for updates!

Litigation

Summary

The Litigation Summary page contains a list of the complaints and answers, appeals, motions, depositions, and trial preparation activities that have been entered in the case file. This page is useful as a simple, at-a-glance view of the progress of litigation. However, it does not include every detail from the Litigation pages, and the columns in the table behave slightly inconsistently due to the differences in the types of litigation actions, so this summary should not be solely relied upon as a complete record of litigation; view the individual litigation pages for more detailed records.

The Litigation Summary page consists of a single table. The records in the table are automatically entered and may not be directly edited or deleted, nor may records be directly added. The table contains the following columns:

| 1 | 2 | 3 | 4 | 5 | 6 |
|--------------|------------------|---|-----------|--------------------|---------------------|
| Date Entered | Category | Type | Served On | Complied/Held Date | Respondent/Deponent |
| 4/4/2018 | Discovery | Party | 4/4/2018 | | |
| 4/4/2018 | Discovery | ORA 3302(d) expert witness exchange served by pla | 4/4/2018 | | El Lilly |
| 5/15/2018 | Discovery | Expert Witness | 5/15/2018 | | Bend, James |
| 5/15/2018 | Depositions | Party | 5/15/2018 | | |
| 4/17/2018 | Complaint/Answer | Summons and Complaint | 11/1/2016 | 3/9/2017 | El Lilly |
| 3/14/2017 | Discovery | Accident/Incident Reports | 3/14/2017 | | |
| | Motions | Extend Time | | | |
| | Motions | Summary Judgment | | | |

1. Date Entered: The date the item was entered or drafted (or the SOL date for complaints and answers).
2. Category: The category of the item (e.g. motions or appeals). Clicking the text will redirect you to the Litigation page associated with the category.
3. Type: The type of the item within the category.
4. Served On: The date of service associated with the item.
5. Complied/Held Date: The date of compliance or completion of the item.
6. Respondent/Deponent: The respondent or relevant party on the item.

Complaints/Answers

The Complaints/Answers page allows you to view and edit the details of complaints and answers in the case. Complaints and answers are mainly managed in the [Defendant Statutes of Limitation Table](#) on the [Critical Deadlines](#) page, in association with individual statutes of limitation. New complaints or answers cannot be added on this page; they may only be added on the Critical Deadlines page, and in fact it is more likely that they will not need to be added at all, since the automatically added statutes of limitation should be sufficient. However, this page allows you to view and edit a portion of the information contained in the Defendant Statutes of Limitation Table, and any changes made here will also affect that table.

The Complaints/Answers page consists of a single table. Each row of the table represents an individual defendant named in a summons and complaint. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Complaints/Answer Table

Columns in the Table

The table contains the following columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|-----------|-----------------|--|---|--|---------|---------|
| Defendant | SOL | Summons and Complaint | Service | Answer | Comment | Actions |
| El Lilly | Date: 4/17/2018 | Last Date to File: 8/27/2017 Filing Date: 7/14/2018 | Last Date to Serve: 11/11/2016 To Process Server: 8/1/2018 Date of Service: 11/1/2016 | Due Date: 4/25/2017 Received Date: 3/9/2017 | | |

1. Defendant: The defendant named in the summons and complaint.
2. SOL: The deadline of the statute of limitations and the date of compliance with the SOL.
3. Summons and Complaint: The deadline to file the summons and complaint and the date it was filed.
4. Service: The deadline to serve the summons and complaint, the date it was delivered to the process server, and the date it was served.
5. Answer: The deadline for the defendant to serve the answer and the date it was received by your firm.
6. Comment: Any comments about the statute of limitations and subsequent deadlines.
7. Actions: Edit icon.

Editing Complaint/Answer Details

To edit complaint and answer details:

1. Click the [Edit icon](#) in the Action column of the row representing the complaint and answer you wish to edit. This will bring up an Add/Edit panel for complaint and answer details, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Complaint/Answer Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Complaint/Answer Panel

The Add/Edit Complaint/Answer Panel allows you to edit the details of a complaint and answer. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

1. Complied Date: The date of compliance with the statute of limitations.
2. Last Date To File S&C: The deadline to file the summons and complaint.
3. Date of Filing of S&C: The date the summons and complaint was filed.
4. Last Date To Serve: The deadline to serve the summons and complaint.
5. To Process Server: The date the summons and complaint was delivered to the process server.
6. Date Of Service: The date the summons and complaint was served.
7. Answer Due: The deadline for the defendant to serve the answer.
8. Answer Received: The date the answer was received by your firm.
9. Comments: Any comments about the Complaint or Answer.

Discovery

The Discovery page allows you to view and record the details of discovery in the case. Note that Depositions are not included on the Discovery page, as there is a separate Depositions page.

The Structure of This Page

Note: The Respondents table is associated with an individual row of the Discovery table, and only appears if the row is set to display subtables. For that reason, whether this table appears in your Discovery page, and where in the Discovery table it appears, will depend on which row, if any, of the Discovery table is set to display subtables. See [Subtables and the Open/Closed Column](#).



1. Add Discovery button. Used to add a new discovery request to the case file. See [Adding a Discovery Request](#).
2. Discovery table. Contains the discovery details and allows various actions to be performed on them. See [Discovery Table](#).
3. Respondents table. Contains the respondent details for a particular discovery request and allows various actions to be performed on them. See [Respondents Table](#).

Discovery Table

The Discovery table is where the details of discovery requests are stored. Each row of the table represents an individual request. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Discovery table contains the following columns:

1. [column with no title]: A plus sign  in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Respondents). Clicking on the plus sign opens the Respondents subtable for that discovery item. The plus sign then turns into a negative sign  which, when clicked, closes the subtable.
2. Date Entered: The date the request was entered in the case file.
3. Type: The type of the request.
4. Served By: The parties or courts that made the request.
5. Description: Any additional description related to this request.
6. Demand/Order Date: The date of the request.
7. Date Type: Whether the request must be complied with on a specific date, by a specific date, or within a certain number of days after a starting date.
8. Date To Comply: The deadline for the request to be complied with.
9. Actions: Add Respondent icon, [Edit icon](#), [Delete icon](#).
10. Documents: The documents associated with the request.

Editing a Discovery Request

To edit a discovery request:

1. Right-click anywhere in the row representing the request you wish to edit. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the request you wish to edit. This will bring up an Add/Edit panel for discovery requests, with the existing information filled in. Skip to step 3.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for discovery requests, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Discovery Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Discovery Request

To delete a discovery request:

1. Click the [Delete icon](#) in the Action column of the row representing the request you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the request, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

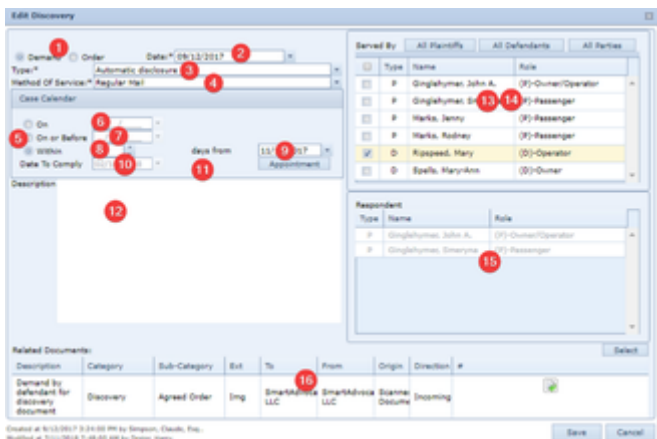
Adding a Discovery Request

To add a new discovery request:

1. Click the Add Discovery button. This will bring up an Add/Edit panel for discovery requests, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Discovery Panel](#) for details about the fields.
3. Click Save to save the request and close the panel.
 - If you decide you do not wish to save the request, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Discovery Panel

The Add/Edit Discovery Panel allows you to fill in the details of a discovery request. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. [Form of Request]: Whether the request was in the form of a demand by a party or an order by the court.
2. Date: The date the request was made.
3. Type: The type of the request.
4. Method Of Service: The method of service of the demand or order.
5. [Deadline Type]: Whether the request must be complied with on a specific date, by a specific date, or within a certain number of days after a starting date.

6. On: The date on which the request must be complied with. This field is uneditable unless On is selected in the [Deadline Type] field. When the date in this field changes, the Date To Comply field is set to the date in this field.
7. On or Before: The date by which the request must be complied with. This field is uneditable unless On or Before is selected in the [Deadline Type] field. When the date in this field changes, the Date To Comply field is set to the date in this field.
8. Within: The number of days after a starting date within which the request must be complied with. This field is uneditable unless Within is selected in the [Deadline Type] field. When the number in this field changes, if the days from field is not blank, the Date To Comply field is set to the date in the days from field plus the number of days in this field.
9. days from: The start date of a period of a certain number of days, within which the request must be complied with. This field is uneditable unless Within is selected in the [Deadline Type] field. When the date in this field changes, if the Within field is not blank, the Date To Comply field is set to the date in this field plus the number of days in the Within field.
10. Date To Comply: The deadline for the request to be complied with. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Discovery selected as the Activity Type and the date in this field selected as the start and end date (or today's date selected if this field is blank).
11. Critical Deadline?: Whether the date to comply should be considered a critical deadline for the case. This field only appears when creating a new request, not when editing an existing request.
12. Description: Any additional description related to this request.
13. Served By: The parties that made the request. This field does not appear if Order is selected in the [Form of Request] field. Clicking the All Plaintiffs button selects all plaintiffs in the case and deselects all defendants. Clicking the All Defendants button selects all defendants in the case and deselects all plaintiffs. Clicking the All Parties button selects all plaintiffs and all defendants in the case.
14. Order By: The courts that ordered the discovery. This field does not appear if Demand is selected in the [Form of Request] field.
15. Respondent: The parties served with the request. This field is uneditable when editing an existing discovery request and contains a list of the selected respondents; see [Respondents Table](#) for managing respondents in existing requests. Clicking the All Plaintiffs button selects all plaintiffs in the case and deselects all defendants. Clicking the All Defendants button selects all defendants in the case and deselects all plaintiffs. Clicking the All Parties button selects all plaintiffs and all defendants in the case.
16. Related Documents: Tool for adding and tracking documents.

Respondents Table

The Respondents table is where the details of respondents to a discovery request are stored. The Respondents table is a subtable of the [Discovery Table](#), which means that each row of the Discovery table has an individual Respondents table associated with it, which is specific to the discovery request in that row; open a row of the Discovery table using the open/close icon to reveal the associated Respondents table. Each row of the table represents an individual respondent. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Respondents table contains the following columns:

| Respondents | | | | |
|-----------------------|----------|-------------------|--------------------|---------|
| Respondent | Comments | Superseded/Waived | Complied/Held Date | Actions |
| Gingelhornes, John | | | | |
| Gingelhornes, Bernard | | | | |

1. Respondent: The name of the respondent.
2. Comments: Any comments about the respondent.
3. Superseded/Waived: The date the request was superseded or waived
4. Complied/Held Date: The date the request was complied with.
5. Actions: [Edit icon](#), [Delete icon](#).

Editing a Respondent

To edit a respondent:

1. Click the [Edit icon](#) in the Action column of the row representing the respondent you wish to edit. This will bring up an Add/Edit panel for respondents, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Respondent Panel](#) for details about the fields.
3. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Respondent

To delete a respondent:

1. Click the [Delete icon](#) in the Action column of the row representing the respondent you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the respondent, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Respondent

To add a new respondent:

1. Click the Add Respondent icon. This will bring up an Add/Edit panel for respondents, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Respondent Panel](#) for details about the fields.
3. Click Save to save the respondent and close the panel.

- If you decide you do not wish to save the respondent, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Respondent Panel

The Add/Edit Respondent Panel allows you to fill in the details of a respondent to a discovery request. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Respondent: The name of the respondent.
2. Discovery To Client: The date the discovery request was passed along to the client.
3. Client Conf. Date: The date of the client conference regarding the request. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Discovery selected as the Activity Type; this field will contain the date of the created appointment.
4. Received from Client: The date the completed discovery request was received from the client.
5. [Resolution]: Whether the discovery request was complied with, superseded, or waived.
6. Date: The date the request was resolved. This field is uneditable if the [Resolution] field is blank.
7. Due Date: Contains the deadline details of the request. Clicking the Appointment button in this field will open an Add/Edit Appointment panel for a new appointment with Discovery selected as the Activity Type and the deadline selected as the start and end date.
8. Comments: Any comments about the respondent.

The Critical Deadline Fields

The Date to Comply field has a Critical Deadline field associated with it, and the Due Date field has an Add/Delete Critical Deadline button associated with it. If the Critical Deadline field is newly selected when the discovery request is saved, a critical deadline will automatically be created for each party selected in the associated Checkbox-select list. The due date of the critical deadline will be the same as the date in the field associated with the Critical Deadline field. Clicking the Delete Critical Deadline associated with the Due Date field will delete the Critical Deadline; similarly, clicking the Add Critical Deadline button associated with the Due Date field will add a critical deadline with the same due date.

The Related Documents Field and Documents Panel

The Related Documents field and Documents panel allow you to select documents that have already been added in the case and specifically relate them to a particular record on this page. This can help you quickly identify and access the most relevant document when you or another staff member visits this page at a later time. When you click Select Documents from the right-click menu, or click the Select button in the Related Documents field, a table of the documents in the case will appear. Find the document or documents you wish to associate with the particular record and select the checkbox for each document. Click Select or Update to confirm the selection. The descriptions of each selected document will appear in the Documents column in the table. Clicking the description of a document will automatically open that document.

Depositions

The Depositions page allows you to view and record the details of depositions in the case.

The Structure of This Page

| Add Deposition | | Depositions | | | | | | |
|--|---------------------------------------|-------------------------|----------------------------------|--|-----------------|-------------------------|-------------------|--|
| Deposition Info | Served By | Depositor | Taxify For | Calendar | Deposition Type | Comments | Documents | |
| Entered: 2/23/2018 Type: Court Ordered Service Method: Court Order Date Served: 2/23/2018 | Rospond, Mary | Likbaal, Rapsheka, W.D. | Rospond, Mary Epalle, MaryAnn | On: 2/28/2018 | Court Ordered | Deposition of Plaintiff | Notice of Hearing | |
| Entered: 3/29/2018 Type: Court Ordered Service Method: Court Order Date Served: 3/29/2018 | Ginglahymen, Emeryna Marka, Rodney | Ginglahymen, John A. | | Within 6 days from: 4/3/2018 Date Scheduled: 5/23/2018 Status: Completed | Court Ordered | | | |
| Entered: 3/29/2018 Type: Court Ordered Service Method: Court Order Date Served: 3/29/2018 | Ginglahymen, Emeryna Marka, Rodney | Ginglahymen, Emeryna | | Within 6 days from: 4/3/2018 | Court Ordered | | | |

1. Add Deposition button. Used to add a new deposition to the case file. See [Adding a Deposition](#).
2. Deposition table. Contains the deposition details and allows various actions to be performed on them. See [Deposition Table](#).

Deposition Table

The Deposition table is where the details of depositions are stored. Each row of the table represents an individual deposition. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Deposition table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|--------------------------------------|--------------------------|---------------------------------|--|---------------|---|-------------------------|-------------------|----|
| Entered: 3/23/2018 Type: Court Ordered Service Method: Court Order Date Served: 3/23/2018 | Ripwood, Mary | Likhaik, Rajeshwar, M.D. | Ripwood, Mary Kapka, Marylou | On: 3/26/2018 | Court Ordered | | Deposition of Plaintiff | Notice of Hearing | |
| Entered: 3/29/2018 Type: Court Ordered Service Method: Court Order Date Served: 3/29/2018 | Gingalyman, Smeryna Marks, Rodney | Gingalyman, John A. | | Within 6 days from: 4/3/2018 Date Scheduled: 5/21/2018 Status: Completed | Court Ordered | | | | |
| Entered: 3/29/2018 Type: Court Ordered Service Method: Court Order Date Served: 3/29/2018 | Gingalyman, Smeryna Marks, Rodney | Gingalyman, Smeryna | | Within 6 days from: 4/9/2018 | Court Ordered | | | | |

1. Deposition Info: The details of the service of the deposition (the date the deposition record was entered in SmartAdvocate, the type of the deposition, and the method and date of service of the notice of deposition).
2. Served By: The parties that initiated the deposition.
3. Deponent: The contact being deposed.
4. Testify For: The parties the deponent's testimony is intended to support.
5. Calendar: The details of the deposition scheduling (the time frame in which the deposition may occur and the date it is scheduled for).
6. Deposition Type: The type of the deposition.
7. Exhibits: The exhibits included in the deposition.
8. Comments: Any comments about the deposition.
9. Documents: The documents associated with the deposition.
10. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Delete, and Select Documents.

Additional columns are available for the Depositions table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Date Entered, Date Scheduled, Date Served, Date to Comply, Date Type, Service Method, and Transcript Dates.

Editing a Deposition

To edit a deposition:

1. Click the [right-click icon](#) in the untitled column of the row representing the deposition you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for deposition, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Deposition Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Deposition

To delete a deposition:

1. Click the [right-click icon](#) in the untitled column of the row representing the deposition you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the deposition, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Deposition

To add a new deposition:

1. Click the Add Deposition button. This will bring up an Add/Edit panel for depositions, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Deposition Panel](#) for details about the fields.
3. Click Save to save the deposition and close the panel.
 - If you decide you do not wish to save the deposition, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Deposition Panel

The Add/Edit Deposition Panel allows you to fill in the details of a deposition. The information in this panel is divided into two tabs, General and Court /Transcript. The headings of the tabs are always visible in the upper left of the panel, but only one tab's contents are visible at a time; click the heading of the tab you wish to access to bring up that tab's information. See [Add/Edit Panels](#) for general information about panel structure and usage. The General tab contains the following fields:

1. Date Entered: The date the deposition record was entered in SmartAdvocate.
2. Type: The type of the deposition.
3. Method of Service: The method of service of the notice of deposition.
4. Date Served: The date of service of the notice of deposition.
5. Case Calendar: The way the deposition time frame is expressed.
6. On: The date on which the deposition must take place. This field is uneditable and ignored unless On is selected in the Case Calendar field.
7. On or Before: The date on or before which the deposition must take place. This field is uneditable and ignored unless On or Before is selected in the Case Calendar field.
8. Within: The number of days after a specified date during which the deposition must take place. This field is uneditable and ignored unless Within is selected in the Case Calendar field.
9. days from: The start date of a specified length of time during which the deposition must take place. This field is uneditable and ignored unless Within is selected in the Case Calendar field.
10. Date To Comply: The last date on which the deposition may take place. If On is selected in the Case Calendar field, this field is automatically set to the same date as the On field. If On or Before is selected in the Case Calendar field, this field is automatically set to the same date as the On or Before field. If Within is selected in the Case Calendar field, this field is automatically set to the date in the days from field plus the number of days in the Within field.
11. Date Scheduled: The date the deposition is scheduled for. This field cannot be edited directly; to edit it, click the New or Edit button to the right of the field, which will open an Add/Edit Appointment Panel. This field will automatically contain the start date of the appointment created through the panel, or None if none have been created. Click the History button to the right of the panel to view the appointment history of the appointment created through this panel.
12. Comments: Any comments about the deposition.
13. Exhibits: The exhibits included in the deposition.
14. Served By: The parties that initiated the deposition. Clicking the All Plaintiffs button selects all plaintiffs in the case and deselects all defendants. Clicking the All Defendants button selects all defendants in the case and deselects all plaintiffs. Clicking the All Parties button selects all plaintiffs and all defendants in the case and changes the Clear All button to read Clear All. Clicking the Clear All button deselects all plaintiffs and all defendants in the case and changes the Clear All button to read All Parties.
15. Deponents [Type]: Whether the contact being deposed is a party in the case, an expert, or a non-party contact.
16. Deponents [Contacts]: The contact being deposed. If Party is selected in Deponents [Type], each plaintiff and defendant in the case. If Expert is selected in Deponents [Type], each expert in the case other than plaintiffs and defendants. If a non-party contact has multiple roles in the case, that contact will appear multiple times in the Non Parties list. This field is a Radio button list when editing an existing deposition and a Checkbox-select list when adding a new deposition.
17. Testify For: The parties the deponent's testimony is intended to support. This field is uneditable, empty, and ignored if Party is selected in the Deponents [Type] field. Clicking the All Plaintiffs button selects all plaintiffs in the case and deselects all defendants. Clicking the All Defendants button selects all defendants in the case and deselects all plaintiffs. Clicking the All Parties button selects all plaintiffs and all defendants in the case and changes the Clear All button to read Clear All. Clicking the Clear All button deselects all plaintiffs and all defendants in the case and changes the Clear All button to read All Parties.

The Court/Transcript tab contains the following fields:

1. Court Reporter: The court reporter recording the deposition transcript.
2. Agency [Court Reporter]: The agency that provided the court reporter.
3. Video Tape?: Whether the deposition was recorded on video.
4. Video Operator: The person operating the camera to film the deposition.
5. Company: The company that provided the video operator.

6. Translator?: Whether a translator was present at the deposition.
7. Translator: The translator present at the deposition.
8. Agency: The agency that provided the translator.
9. [Signee]: The type of contact responsible for signing the corrected transcript.
10. [Signature Status]: Whether the corrected transcript was signed, or the right to sign a corrected transcript was waived.
11. Transcript Requested: The date the deposition transcript was requested from the reporting agency.
12. Transcript Received: The date the deposition transcript was received from the reporting agency.
13. Transcript To Client: The date the deposition transcript was sent to your client.
14. Executed Transcript Received: The date the executed transcript was received from your client.
15. Executed Transcript To Defense Attorney: The date the executed transcript was sent to the defense attorney.
16. Executed Date: The date the transcript was executed.
17. Related Documents: Tool for adding and tracking documents.

The Related Documents Field and Documents Panel

The Related Documents field and Documents panel allow you to select documents that have already been added in the case and specifically relate them to a particular record on this page. This can help quickly identify and access the most relevant document when you or another staff member visits this page at a later time. When you click Select Documents from the right-click menu, or click the Select button in the Related Documents field, a table of the documents in the case will appear. Find the document or documents you wish to associate with the particular record and select the checkbox for each document. Click Select or Update to confirm the selection. The descriptions of each selected document will appear in the Documents column in the table. Clicking the description of a document will automatically open that document.

Motions

The Motions page allows you to view and record the details of motions in the case. The page includes motions served on your firm in addition to those initiated by your firm. Note that orders to show cause are also recorded on this page in the Motions table, even though they are not technically motions. This manual will follow the convention of the SmartAdvocate system and use "motion" to describe any action requesting a judge's decision. To distinguish between actual motions and orders to show cause, use the [Category] field in [The Add/Edit Motion Panel](#).

The Structure of This Page

| Motion | Date Sent/Received | Movants | Respondents | Return Date | Documents | Comments | Relief Granted |
|--------------------------------|--------------------|---|---|-------------|---------------------------------|----------|----------------|
| Summary Judgment (Unspecified) | 5/3/2018 | Dingelkorn, John A. Dingelkorn, Emeryne Hicks, Rodney | Dingelkorn, Emeryne Rosenow, Mary Spaeth, MaryAnn | 6/8/2018 | Notice of Hearing - Arbitration | | Partial |
| Default (Submission) | 4/3/2018 | Dingelkorn, John A. Dingelkorn, Emeryne Hicks, Jerry Hicks, Rodney | Rosenow, Mary Spaeth, MaryAnn | 4/27/2018 | | | Partial |

1. Add Motion button. Used to add a motion to the case file. See [Adding a Motion](#).
2. Motions table. Contains the motion details and allows various actions to be performed on them. See [Motions Table](#).

Motions Table

The Motions table is where the details of motions are stored. Each row of the table represents an individual motion. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Motions table contains the following available columns:

| Motion | Date Sent/Received | Movants | Respondents | Return Date | Documents | Comments | Relief Granted |
|--|--------------------|---|---|-------------|---------------------------------|----------|----------------|
| Summary Judgment (Unspecified) | 5/3/2018 | Dingelkorn, John A. Dingelkorn, Emeryne Hicks, Rodney | Dingelkorn, Emeryne Rosenow, Mary Spaeth, MaryAnn | 6/8/2018 | Notice of Hearing - Arbitration | | Partial |
| Default (Submission) | 4/3/2018 | Dingelkorn, John A. Dingelkorn, Emeryne Hicks, Jerry Hicks, Rodney | Rosenow, Mary Spaeth, MaryAnn | 4/27/2018 | | | Partial |
| Affidavit in support of motion (Unspecified) | 5/3/2018 | Dingelkorn, John A. | | | | | Partial |

1. Motion: The type of the motion and the form of the motion. If the [Form] field in [The Add/Edit Motion Panel](#) is left blank, this column behaves as though Submission were selected.
2. Date Sent/Received: The date on which the motion was sent or received by your firm.
3. Movants: The parties that initiated the motion.
4. Respondents: The parties against whom the motion was filed.
5. Return Date: The date the motion is to be heard by the court.
6. Documents: The documents associated with the motion.
7. Comments: Any comments about the motion.
8. Relief: Whether the court granted or denied relief, or partially granted or denied relief.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Delete, and Select Documents.

Editing a Motion

To edit a motion:

1. Click the [right-click icon](#) in the untitled column of the row representing the motion you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for motions, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Motion Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Motion

To delete a motion:

1. Click the [right-click icon](#) in the untitled column of the row representing the motion you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the motion, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Motion

To add a new motion:

1. Click the Add Motion button. This will bring up an Add/Edit panel for motions, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Motion Panel](#) for details about the fields.
3. Click Save to save the motion and close the panel.
 - If you decide you do not wish to save the motion, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Motion Panel

The Add/Edit Motion Panel allows you to fill in the details of a motion. Note: When adding a new motion, the panel that appears is a combination of this panel and [The Add/Edit Respondent Panel](#). This panel appears alone when editing an existing motion. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Motion **1** Order to Show Cause Type: **3**
 Submission **2** Oral Unspecified Date Sent/Received: **4**

Movants:

| # | Type | Name | Role |
|-------------------------------------|------|-------------------------------|--------------------|
| <input checked="" type="checkbox"/> | P | Gingelhymer, John A. | (P)-Owner/Operator |
| <input checked="" type="checkbox"/> | P | Gingelhymer, Smeryna 5 | (P)-Passenger |
| <input checked="" type="checkbox"/> | P | Marks, Rodney | (P)-Passenger |

Return Date: **6** Edit History
 Method of Service: **7** Court Filing Completed: **8** E-File **9**
 Opposition Due: **10** Critical Deadline **11** Cross Motion Received **12**
 Reply Due: **13** Critical Deadline **14**

| Respondent | Served/Received | Opposition (S/R) | Reply (S/R) | Comments | Action |
|----------------------|-----------------|------------------|-------------|----------|---|
| | | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Ripspeed, Mary | | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Spells, Mary-Ann | | | 15 | | <input type="checkbox"/> <input type="checkbox"/> |
| Gingelhymer, Smeryna | 5/4/2018 | 5/14/2018 | 5/23/2018 | | <input type="checkbox"/> <input type="checkbox"/> |

Decision/Order **16**
 Received from Court Received from Other Parties
 Relief Granted: Yes No Partial **17**
 Decision/Order Date: **18** Order Received: **19**
 Order Sent: **20** Order Served: **21**
 Method of Service: **22** Court Order Filed: **23** E-File
 Last Date to Comply with Order: **24** Critical Deadlines for: **25**

Settle Order **26**
 Last Date to Settle: **27** Critical Deadline **28**
 Settlement Date: **29**
 Order Date: **30**
 Last Date for Notice of Appeal: **31** Critical Deadline **32**

Comments:
 33

Related Documents:

| Description | Category | Sub-Category | Ext | to | From | Origin | Direction |
|---------------------------------|----------------|------------------|---------------|----------------------|-----------------|--------|-----------|
| Notice of Hearing - Arbitration | Correspondence | Letter To Client | Doc 34 | Gingelhymer, John A. | SmartAdvoca LLC | Docume | Outgoing |

Created at 2/22/2018 10:04:00 AM by Simpson, Claude, Esq.
 Modified at 7/13/2018 10:43:00 AM by Unlabeled Mary

- [Category]: Whether the action is a motion or an order to show cause.
- [Form]: Whether the motion is made by submitting on the papers, oral argument is requested, or it is unspecified.
- Type: The type of the motion.
- Date Sent/Received: The date the motion was sent or received by your firm.
- Movants: The parties that initiated the motion. Clicking the All Plaintiffs button selects all plaintiffs in the case and deselects all defendants. Clicking the All Defendants button selects all defendants in the case and deselects all plaintiffs. Clicking the All Parties button selects all plaintiffs and all defendants in the case.
- Return Date: The date the motion is to be heard by the court. This field cannot be edited directly; to edit it, click the Add or Edit button to the right of the field, which will open an Add/Edit Appointment Panel. This field will automatically contain the start date of the appointment created through the panel. Click the History button to the right of the panel to view the appointment history of the appointment created through this panel.
- Method of Service: The method of service of the notice of motion or order to show cause.
- Court Filing Completed: The date the motion papers were filed with the court.
- E-File: Whether the motion or order to show cause was filed electronically.
- Opposition Due: The deadline to serve opposition papers on the motion.
- Critical Deadline [Opposition]: Whether SmartAdvocate should create a Critical Deadline from the Opposition Due date.
- Cross Motion Received: Whether a cross motion was filed in response to the motion. If this box is checked, a comment box opens, permitting the entry of information about the cross motion.
- Reply Due: The deadline to serve reply papers on the motion.
- Critical Deadline [Reply Due]: Whether SmartAdvocate should create a Critical Deadline from the Reply Due date.
- [Respondent Table]: A table allowing you to enter the parties who are respondents in the motion or order to show cause. The first row of the table permits the entry of the respondents; subsequent rows list parties already listed as respondents and allows them to be edited or deleted.
- Decision/Order: Whether the court's decision or order was received from the court or from other parties.
- Relief Granted: Whether the court order or decision granted, denied, or partially granted and denied the relief requested in the motion or order to show cause.
- Decision/Order Date: The date of the court's decision or order.
- Order Received: The date the court's order was received by your firm.
- Order Sent: The date the court's order was sent to your adversary by your firm.
- Order Served: The date the court's order was served on or by your firm.
- Method of Service: The method of service of the Court's order.
- Court Order Filed: The date on which the court's order was filed.
- Last Date to Comply with Order: The last date on which compliance with the court's order is required.
- Critical Deadlines for: A multi-choice dropdown listing all parties, which creates a critical deadline for compliance with the court's order for those parties chosen.
- Settle Order: Whether it is required to settle with your firm's adversary on the form of the order.

27. Last Date to Settle: The date by which the parties must settle on the form of the court order. This field is uneditable unless the Settle Order box is checked.
28. Critical Deadline [Settle Order]: Whether a Critical Deadline should be created from the Last Date to Settle.
29. Settlement Date: The date on which the parties settled on the form of the court order.
30. Order Date: The date of the court order.
31. Last Date for Notice of Appeal: The last date on which an appeal of the court order can be filed.
32. Critical Deadline [Appeal]: Whether a Critical Deadline should be created from the Last Date for Notice of Appeal.
33. Comments: Any comments about the motion or order to show cause.
34. Related Documents: Tool for adding and tracking documents.

Expert

The Expert page allows you to view and record the details of experts involved in the evaluation, preparation, and litigation of the case, employed either by your firm, the opposing firm, or the court.

The Structure of This Page

Note: The Add Report button and Expert Reports table are both associated with an individual row of the Expert Details table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Expert page, and where in the Expert Details table they appear, will depend on which row, if any, of the Expert Details table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot shows the 'Expert Details' section of a software interface. It includes an 'Add Expert' button (1), a table of expert details (2) with columns for Name, Specialty, Sub-Specialty, Party, Disclosure, Will Testify, Retainer Amount, Date Retained, and Comments. Below this is an 'Add Report' button (3) and an 'Expert Reports' table (4) with columns for Report Type, Request Date, Paid Date, Amount Paid, Receipt Date, Exchange, Documents, and Comments. Further down is an 'Add New Note' button (5) and an 'Expert Notes' table (6) with columns for Date, Staff, Type, and Notes. The interface also shows a page indicator 'Page 1 of 1 (1 items)'.

1. Add Expert button. Used to add a new expert to the case file. See [Adding an Expert](#).
2. Expert Details table. Contains the expert details and allows various actions to be performed on them. See [Expert Details Table](#).
3. Add Report button. Used to add a new expert report to the case file. See [Adding an Expert Report](#).
4. Expert Reports table. Contains the expert report details and allows various actions to be performed on them. See [Expert Reports Table](#).
5. Add New Note button. Used to add a new Expert note to the case file. See [Adding a Note](#).
6. Expert Notes table. Contains Expert notes, and allows various actions to be performed on them. See [Expert Notes Table](#).

Expert Details Table

The Expert Details table is where the details of experts are stored. Each row of the table represents an individual expert. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Expert Details table contains the following available columns:

This screenshot provides a closer look at the 'Expert Details' table. It shows two rows of data. The first row is for 'Levine, Jeffrey' with columns for Name (2), Specialty (3), Sub-Specialty (4), Party (5), Disclosure (6), Will Testify (7), Retainer Amount (8), Date Retained (9), and Comments (10). A plus sign (+) in the first column (1) indicates expandable details. The second row is for 'Settina, Harry L.' with similar data. A minus sign (-) in the first column (11) indicates a collapsed row. A small 'Expert' label is visible in the top right corner (12).

1. [column with no title]: A plus sign (+) in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Bill Details and Amount Paid for that Service Provider). Clicking on the plus sign opens the Bill Details / Amount Paid subtables for that service provider. The plus sign then turns into a negative sign (-) which, when clicked, closes the subtable.
2. Expert Name: The name of the expert.
3. Specialty: The field in which the expert specializes.
4. Sub-Specialty: The expert's sub-specialty.
5. Party: Which party is employing the expert.
6. Disclosure: The date the expert was disclosed to the opposing party and whether disclosure is required.
7. Will Testify: Whether the expert will testify at trial.
8. Retainer Amount: The amount of compensation provided to the expert by the retainer.
9. Date Retained: The date the expert was retained.
10. Comments: Any comments about the expert.

11. Docs: The number of documents associated with the expert and a link to the documents in the [Documents](#) case page.
12. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Delete, and Add Report.

Additional columns are available for the Expert Details table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Disclosure Date, and Disclosure Required.

Editing an Expert

To edit an expert:

1. Click the [right-click icon](#) in the untitled column of the row representing the expert you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for experts, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Expert Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Expert

To delete an expert:

1. Click the [right-click icon](#) in the untitled column of the row representing the expert you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the expert, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

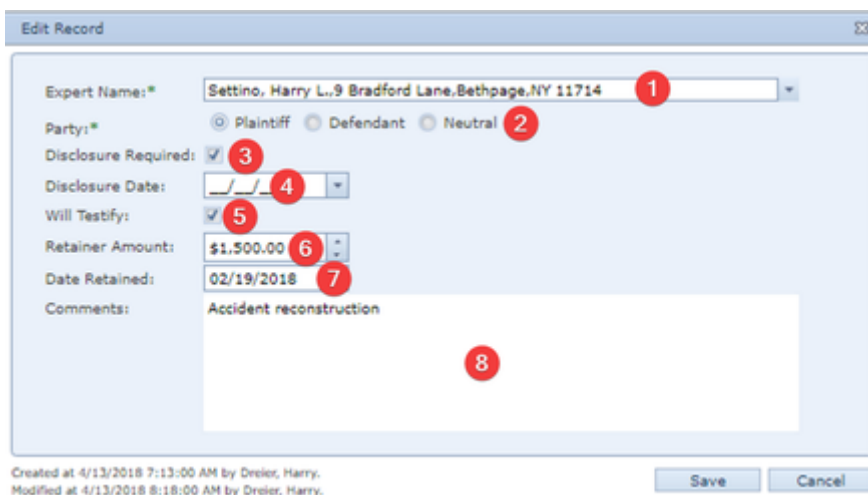
Adding an Expert

To add a new expert:

1. Click the Add Expert button. This will bring up an Add/Edit panel for experts, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Expert Panel](#) for details about the fields.
3. Click Save to save the expert and close the panel.
 - If you decide you do not wish to save the expert, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Expert Panel

The Add/Edit Expert Panel allows you to fill in the details of an expert. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Expert Name: The name of the expert. If the Show only prior experts checkbox in the dropdown is selected, the dropdown will only show contacts already listed as an expert in some case; otherwise, the dropdown will show all contacts.
2. Party: Which party is employing the expert.
3. Disclosure Required: Whether the expert is required to be disclosed to the opposing party.
4. Disclosure Date: The date the expert was disclosed to the opposing party.
5. Will Testify: Whether the expert will testify at trial.
6. Retainer Amount: The amount of compensation provided to the expert by the retainer.
7. Date Retained: The date the expert was retained.
8. Comments: Any comments about the expert.

The Expert Reports table is where the details of reports generated by experts are stored. The Expert Reports table is a subtable of the [Expert Details Table](#), which means that each row of the Expert Details table has an individual Expert Reports table associated with it, which is specific to the expert in that row; open a row of the Expert Details table using the open/close icon to reveal the associated Expert Reports table. Each row of the table represents an individual report. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Expert Reports table contains the following available columns:

| Report Type | Request Date | Paid Date | Amount Paid | Receipt Date | Exchange | Documents | Comments |
|----------------------|--------------|-----------|-------------|--------------|----------|--|----------|
| Investigative Report | 3/12/2018 | 4/30/2018 | \$1,250.00 | 4/24/2018 | | INVESTIGATION - Authority report issued - SA | |

1. Report Type: The type of the report.
2. Request Date: The date the report was requested of the expert.
3. Paid Date: The date the expert was paid for the report.
4. Amount Paid: The amount paid to the expert for the report.
5. Receipt Date: The date the report was received by the party requesting it.
6. Exchange: Whether the report is required to be exchanged with the opposing party, the date the opposing party requested the exchange, and the date the report was exchanged.
7. Comments: Any comments about the report.
8. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing an Expert Report

To edit an expert report:

1. Click the [right-click icon](#) in the untitled column of the row representing the report you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for expert reports, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Report Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Expert Report

To delete an Expert Report:

1. Click the [right-click icon](#) in the untitled column of the row representing the report you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the report, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Expert Report

To add a new expert report:

1. Click the Add Report button. This will bring up an Add/Edit panel for expert reports, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Report Panel](#) for details about the fields.
3. Click Save to save the report and close the panel.
 - If you decide you do not wish to save the report, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Report Panel

The Add/Edit Report Panel allows you to fill in the details of an expert report. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:


1. Report Type: The type of the report.
2. Request Date: The date the report was requested of the expert.
3. Paid Date: The date the expert was paid for the report.
4. Amount Paid: The amount paid to the expert for the report.
5. Receipt Date: The date the report was received by the party requesting it.
6. Exchange Required: Whether the report is required to be exchanged with the opposing party.
7. Exchange Requested: The date the opposing party requested the exchange of the report.
8. Exchange Report Date: The date the report was exchanged.
9. Comments: Any comments about the report.
10. Related Documents: Tool for adding and tracking documents. Click the Select button to add a document to this report.

Expert Notes Table

The Notes table displays the details of notes that have the Expert type. Each row of the table represents an individual note. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below. See the [Notes](#) case page for viewing notes of all types.

Columns in the Table

The Notes table contains the following available columns:

1. Date: The date and time the note was created.
2. Staff: The staff member who created the note.
3. Notes: The content of the note, including formatting.
4.  Unknown Attachment [Priority]: The priority level of the note.
5. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Email, Print, Copy, and Delete.
6. Type: The note's type.

Editing a Note

To edit a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for notes, with the existing information filled in.
3. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Emailing a Note

To email a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to email, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Email option in the menu. This will open the Case Email panel with the note's creator, date and time of creation, and content automatically entered in the body of the email.
3. Fill out the email with any desired additional content.
4. Click Send to send the email.
 - If you decide you do not wish to send the email, click the white X at the upper right of the panel to close the panel without sending the email.

Printing a Note

To print a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to print, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Print option in the menu. This will open a new tab containing the details of the note, and immediately bring up your browser's print options for that tab.
 - The details of the note include the number, name, type and status of the case the note is part of; the note's type and priority level; the date the note was created; the staff member who created the note; the date the note was modified; the staff member who modified the note; and the contents of the note.
3. Select the print options you desire and print the note. (Since the printing is performed by the browser and not by SmartAdvocate, different users may have different printing interfaces. Consult your browser's help if you need further details at this point.)
 - Note that after printing, the tab containing the note will remain open. You may close this if you wish.

Copying a Note

To copy a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to copy, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Copy option in the menu. This will bring up a panel allowing you to choose which case file to copy the note to. The panel contains a [Radio button](#) group for the last ten cases you have visited (including the case the note is already in, in case you wish to put an additional copy of the note in the same file). It also includes a [Text input](#) field for the case's case number, in case you wish to copy the note to a case other than the ten listed.
3. If you wish to copy the note to one of the last ten cases you have visited, click the radio button associated with that case. If you wish to copy the note to some other case, instead type that case's case number in the text input field.
4. Click Copy to copy the note to the chosen case file.
 - If you decide you do not wish to copy the note, click Cancel instead of clicking Copy to cancel the copying and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Note

To delete a note:

1. Click the [right-click icon](#) in the untitled column of the row representing the note you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the note, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Note

To add a new note:

1. Click the Add New Note button. This will bring up The Add/Edit Note Panel with the Expert type already selected.
 - The note type will still be editable; in theory, you could add any type of note starting from the Expert page. However, it is generally better practice to use the Add Note icon for notes of arbitrary types.
2. Fill out the note and save it. See [Add a Note](#) for how to fill out and save notes.

Expert UDFs




The Expert UDFs page contains all user-defined fields for the case's case type that have Expert as their Screen value. It is used to store any information about experts, whether for the plaintiff or the defendant, that is not otherwise covered by some page in SmartAdvocate. See the [UDF Editor](#) page for creating and managing user-defined fields, for a description of the available field formats, and for an explanation of how user-defined fields are organized on this and other UDF pages.

Evidence

The Evidence page allows you to view and record the details of evidence to be presented in the case.

The Structure of This Page



| Evidence Type | Evidence Description | Storage Location | Storage Contact | Comment | Action |
|------------------------|---|---------------------------|-----------------|---|---|
| Police Accident Report | Defendant statement admitting negligence on Police Accident Report | Storage Room A | | |   |
| Bicycle | The damaged bicycle that plaintiff was riding when he was involved in the accident. | Off-site Storage Facility | | Bicycle needs to be examined by a bike expert to determine whether it was defectively manufactured. |   |

1. Add Evidence button. Used to add a new piece of evidence to the case file. See [Adding Evidence](#).

2. Evidence table. Contains the evidence details and allows various actions to be performed on them. See [Evidence Table](#).

Evidence Table

The evidence table is where the details of the evidence in the case are stored. Each row of the table represents an individual piece of evidence. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The evidence table contains the following available columns:



| Evidence Type | Evidence Description | Storage Location | Storage Contact | Comment | Action |
|------------------------|---|---------------------------|-----------------|---|---|
| Police Accident Report | Defendant statement admitting negligence in Police Accident Report | Storage Room A | | |   |
| Bicycle | The damaged bicycle that plaintiff was riding when he was involved in the accident. | Off-site Storage Facility | | Bicycle needs to be examined by a bike expert to determine whether it was defectively manufactured. |   |

1. Evidence Type: The form of the evidence.
2. Evidence Description: The description of the evidence.
3. Storage Location: The place where the evidence is stored.
4. Storage Contact: The individual who can be contacted regarding the storage location.
5. Comment: Any comments about the evidence or storage.
6. Action: [Edit icon](#), [Delete icon](#).

Editing Evidence

To edit a piece of evidence:

1. Click the [Edit icon](#) in the Action column of the row representing the evidence you wish to edit. This will bring up an Add/Edit panel for evidence, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Evidence Panel](#) for details about the fields.
3. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Evidence

To delete a piece of evidence:

1. Click the [Delete icon](#) in the Action column of the row representing the evidence you wish to delete. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the evidence, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

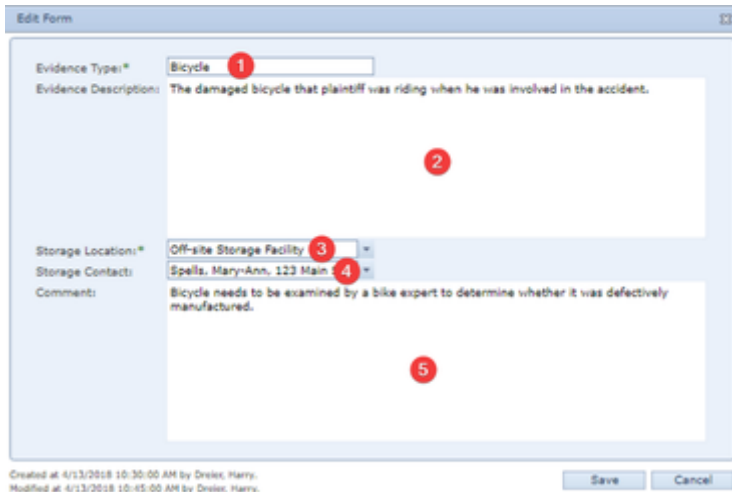
Adding Evidence

To add a new piece of evidence:

1. Click the Add Evidence button. This will bring up an Add/Edit panel for evidence, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Evidence Panel](#) for details about the fields.
3. Click Update to save the evidence and close the panel.
 - If you decide you do not wish to save the evidence, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Evidence Panel

The Add/Edit Evidence Panel allows you to fill in the details of a piece of evidence. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:



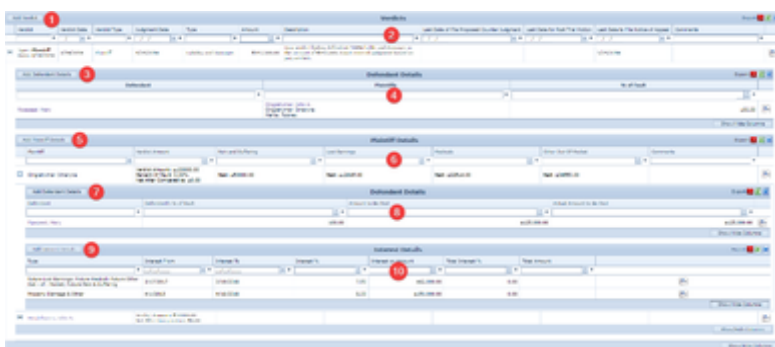
1. Evidence Type: The form of the evidence.
2. Evidence Description: The description of the evidence.
3. Storage Location: The location where the evidence is stored
4. Storage Contact: The individual who can be contacted regarding the storage location.
5. Comment: Any comments about the evidence or storage.

Verdict

The Verdict page allows you to view and record the details of the verdict in the case.

The Structure of This Page

Note: The Add Defendant Details [Verdict] button, Defendant Details [Verdict] table, Add Plaintiff Details button, and Plaintiff Details table are all associated with an individual row of the Verdicts table, and only appear if the row is set to display subtables. Additionally, the Add Defendant Details [Plaintiff] button, Defendant Details [Plaintiff] table, Add Interest Details, and Interest Details table are all associated with an individual row of an individual Plaintiff Details table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Verdicts page, and where in the Verdicts or Plaintiff Details table they appear, will depend on which row, if any, of the Verdicts and Plaintiff Details tables is set to display subtables. See [Subtables and the Open/Closed Column](#).



1. Add Verdict button. Used to add a new verdict to the case file. See [Adding a Verdict](#).
2. Verdicts table. Contains the verdict details and allows various actions to be performed on them. See [Verdicts Table](#).
3. Add Defendant Details [Verdict] button. Used to add basic details about a defendant's percentage of fault in a verdict for the plaintiff to the case file. See [Adding Basic Defendant Details](#).
4. Defendant Details [Verdict] table. Contains basic details about the defendants' percentage of fault in a verdict for the plaintiff and allows various actions to be performed on them. See [Defendant Details \[Verdict\] Table](#).
5. Add Plaintiff Details button. Used to add a plaintiff's damages in a verdict for the plaintiff to the case file. See [Adding Plaintiff Damages](#).
6. Plaintiff Details table. Contains the details of a plaintiff's damages in a verdict for the plaintiff and allows various actions to be performed on them. See [Plaintiff Details Table](#).
7. Add Defendant Details [Plaintiff] button. Used to add details about a defendant's fault in a particular plaintiff's damages in a verdict for the plaintiff to the case file. See [Adding Defendant Details](#).
8. Defendant Details [Plaintiff] table. Contains details about defendants' fault in a particular plaintiff's damages in a verdict for the plaintiff and allows various actions to be performed on them. See [Defendant Details \[Plaintiff\] Table](#).
9. Add Interest Details button. Used to add a new assessment of interest on damages in a verdict for the plaintiff to the case file. See [Adding Interest](#).
10. Interest Details table. Contains the details of interest on damages in a verdict for the plaintiff and allows various actions to be performed on them. See [Interest Details Table](#).

The Verdicts table is where the details of the verdict are stored. Each row of the table represents an individual verdict (there may be more than one row if, for example, some defendants are judged at fault and others are not). See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Verdicts table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |
|-------------|--------------|--------------|---------------|-----------------------|--------------|--|---|---------------------------------|------------------------------------|----------|----|----|
| Add Verdict | Verdict Date | Verdict Type | Judgment Date | Type | Amount | Description | Last Date of File Proposed Counter Judgment | Last Date for Post Trial Motion | Last Date to File Notice of Appeal | Comments | | |
| + | 3/13/2018 | Verdict | 4/24/2018 | Liability and Damages | \$147,800.00 | Jury verdict finding defendant 100% liable and damages in the amount of \$147,800. Court entered judgment based on jury verdict. | | | 5/24/2018 | | | |

- [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Defendant Details, Plaintiff Details and, under Plaintiff Details, Defendant Details [Plaintiff] and Interest Details for that Verdict). Clicking on the plus sign opens the subtables for that verdict. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
- Verdict: The type and date of the verdict.
- Verdict Date: The date of the verdict.
- Verdict Type: The type of the verdict.
- Judgment Date: The date of the judgment.
- Type: Whether the verdict covered the question of liability, of damages, or of both.
- Amount: The amount of the judgment.
- Description: The description of the verdict.
- Last Date of File Proposed Counter Judgment: The deadline to file a proposed counter judgment.
- Last Date for Post Trial Motion: The deadline to make post-trial motions.
- Last Date to File Notice of Appeal: The deadline to file a notice of appeal.
- Comments: Any comments about the verdict.
- [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Additional columns are available for the Verdicts table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Abstract Received, Bill of Cost Method of Service, Entered Judgment & Bill of Cost Served/Received, Judgment Settlement, Last Date for Settle Judgment, Payment of Judge Due, Proposed Counter Judgment Method of Service, Proposed Counter Judgment Served/Received, Proposed Judgment Method of Service, Proposed Judgment Served/Received.

Editing a Verdict

To edit a verdict:

- Click the [right-click icon](#) in the untitled column of the row representing the verdict you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
- Click the Edit option in the menu. This will bring up an Add/Edit panel for verdicts, with the existing information filled in.
- Fill the fields in with your desired information. See [The Add/Edit Verdict Panel](#) for details about the fields.
- Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Verdict

To delete a verdict:

- Click the [right-click icon](#) in the untitled column of the row representing the verdict you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
- Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
- Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the verdict, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Verdict

To add a new verdict:

- Click the Add Verdict button. This will bring up an Add/Edit panel for verdicts, blank except for defaults.
- Fill the fields in with your desired information. See [The Add/Edit Verdict Panel](#) for details about the fields.
- Click Save to save the verdict and close the panel.
 - If you decide you do not wish to save the verdict, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Verdict Panel

The Add/Edit Verdict Panel allows you to fill in the details of a verdict. The fields that appear in the panel differ significantly depending on whether the verdict is for the plaintiff, for the defendant, or a mistrial. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Edit Record

Type of Verdict: Plaintiff (1) Verdict Date: 03/13/2018 (2)

Last Date for Post Trial Motion: / / (3) Appointment (14)

Abstract Received: / / (4)

Last Date to File Notice of Appeal: 03/24/2018 (5) Critical Dead (6)

Last Date for Settle Judgment: / / (7) Appointment (17)

Proposed Judgment Served/Received: 03/27 (8)

Proposed Judgment Method of Service: Certified Mail - RRR (9)

Judgment Settlement: / / (10) Appointment (18)

Last Date of File Proposed Counter Judgment: / / (11)

Proposed Counter Judgment Served/Received: / / (12)

Proposed Counter Judgment Method of Service: / / (13)

Amount: \$147,500.00 (14)

Judgment Date: 04/24/2018 (15)

Entered Judgment & Bill of Cost Served/Received: / / (16)

Bill of Cost Method of Service: / / (17)

Payment of Judge Due: / / (18) Appointment (19)

Type: Liability and Damages (19)

Description: Jury verdict finding defendant 100% liable and damages in the amount of \$147,500. Court entered judgment based on jury verdict. (20)

Comments: (21)

Created at 4/13/2018 18:53:00 AM by Doris, Mary. Modified at 4/16/2018 7:56:00 AM by Doris, Mary.

Edit Record

Type of Verdict: Defendant (1) Verdict Date: 02/15/2018 (2)

Last Date for Post Trial Motion: 02/14/2018 (3) Appointment (14)

Abstract Received: 04/14/2018 (4)

Last Date to File Notice of Appeal: 02/04/2018 (5) Critical Deadline (6)

Description: Defendant found not liable. (18)

Comments: (19)

Created at 7/12/2018 12:14:00 AM by Doris, Mary.

Edit Record

Type of Verdict: Mistrial (1) Verdict Date: 02/15/2018 (2)

Description: Jury as 8-3 to 3. (20)

Comments: (21)

New Trial Date: / / (23) Appointment (14)

Created at 7/12/2018 12:13:00 AM by Doris, Mary.

1. Type of Verdict: The type of the verdict.
2. Verdict Date: The date of the verdict.
3. Last Date for Post Trial Motion: The deadline to make post-trial motions. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear if Mistrial is selected in Type of Verdict.
4. Abstract Received: The date your firm received the abstract of the judgment. This field does not appear if Mistrial is selected in Type of Verdict.
5. Last Date to File Notice of Appeal: The deadline to file a notice of appeal. This field does not appear if Mistrial is selected in Type of Verdict.
6. Critical Deadline: Whether the deadline to file a notice of appeal should be considered a critical deadline for the case. If this field is selected, a corresponding critical deadline will automatically be created on the Critical Deadlines page, set to the date in the Last Date to File Notice of Appeal field. This field does not appear if Mistrial is selected in Type of Verdict.
7. Last Date for Settle Judgment: The deadline to settle the judgment. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Plaintiff is selected in Type of Verdict.
8. Proposed Judgment Served/Received: The date the proposed judgment was served or received by your firm. This field does not appear unless Plaintiff is selected in Type of Verdict.
9. Proposed Judgment Method of Service: The method of service of the proposed judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
10. Judgment Settlement: The date of settlement of the judgment. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Plaintiff is selected in Type of Verdict.
11. Last Date of File Proposed Counter Judgment: The deadline to file a proposed counter judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
12. Proposed Counter Judgment Served/Received: The date the proposed counter judgment was served or received by your firm. This field does not appear unless Plaintiff is selected in Type of Verdict.

13. Proposed Counter Judgment Method of Service: The method of service of the proposed counter judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
14. Amount: The amount of the judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
15. Judgment Date: The date of the judgment. This field does not appear unless Plaintiff is selected in Type of Verdict
16. Entered Judgment & Bill of Cost Served/Received: The date the notice of entry of the judgment and bill of costs were served or received by your firm. This field does not appear unless Plaintiff is selected in Type of Verdict.
17. Bill of Cost Method of Service: The method of service of the bill of costs. This field does not appear unless Plaintiff is selected in Type of Verdict.
18. Payment of Judge Due: The deadline to pay the judge (if the case was heard by a private judge). Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Plaintiff is selected in Type of Verdict.
19. Type: Whether the verdict covered the question of liability, of damages, or of both. This field does not appear unless Plaintiff is selected in Type of Verdict.
20. Description: The description of the verdict.
21. Comments: Any comments about the verdict.
22. Defendants: The defendants covered by the verdict. This field does not appear unless Defendant is selected in Type of Verdict.
23. New Trial Date: The date a retrial is scheduled to begin. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Mistrial is selected in Type of Verdict.

Appeals

The Appeals page allows you to view and record the details of appeals in the case.

The Structure of This Page

Court UDFs

The Court UDFs page contains all user-defined fields for the case's case type that have Court as their Screen value. It is used to store any information about the court, judge, dockets, or related subjects that is not otherwise covered by some page in SmartAdvocate. See the [UDF Editor](#) page for creating and managing user-defined fields, for a description of the available field formats, and for an explanation of how user-defined fields are organized on this and other UDF pages.

Entries on Litigation Screen synced to the calendar

Appeals

This page is currently under construction. Check back for updates!

Complaints/Answers

The Complaint/Answer screen allows you to view and record the details of complaints and answers in the case.

The Structure of This Page

| 23-A-00012- Swanson, Todd -v- Robinson, Terry-Ann | | Auto Accident (Rear End, Red Light) 3/24/2023 GA | | | | Attorney: Aleksandrov, Yuriy | |
|---|---------------------------------------|--|---|---|-----------|------------------------------|----------|
| Complaints/Answers | | | | | | | |
| Defendant 1 | SOL 2 | Summons and Complaint 3 | Service 4 | Answer 5 | Comment 6 | Documents 7 | Action 8 |
| Robinson, Terry-Ann I. | Date: 3/24/2025 Complied: 4/5/2023 | Filing Date: 4/5/2023 | Last Date to Serve: 8/3/2023 Date Of Service: 4/6/2023 | Due Date: 5/6/2023 Received Date: 4/6/2023 | | | |

1. Defendant's Name
2. Statues of Limitation Information: Shows the SOL date and the date the SOL is complied.
3. Summons and Complaint Information: Shows the last date to file and the filing date of the summons and complaint.
4. Service Information: Shows last date to serve, the date the summons and complaint were sent to the process server, and the date of service.
5. Answer Information: Shows Answer due date and date answer is received.
6. Comment: Shows any comments related to summons and complaint.
7. Documents: Shows links to documents linked to Summons and Complaint entry.
8. Action Icon

Most of the information on this screen is taken from the **Add/Edit Defendant SOL panel**. No information can be added, edited, or deleted directly from this page. However, you can right-click on any row on the page and select Edit; This will open the Edit Defendant SOL panel.

Depositions

The Deposition screen allows for the viewing and recording of depositions in the case.

Structure of This Page

| Deposition Info | Served By | Deponent | Testify For | Calendar | Documents | Action |
|--|--|--------------|-------------|---|-----------|--------|
| Entered: 3/10/2021 Type: Court Ordered Service Method: Regular Mail/Personal Service Date Served: 3/10/2021 | SinglePoint, Emerald SinglePoint, Emerald | Rippon, Mary | | On: 3/10/2021 Date Scheduled: 3/10/2021 Status: Completed | | |

1. Deposition Information: Lists type of deposition, method and date of service.
2. Served By: Party requesting the deposition.
3. Deponent: Name of the person being deposed.
4. Testify For: Where the deponent is an expert or a non-party, on which party's behalf is the deposition being taken.
5. Calendar: The date on which the deposition is scheduled and whether it has taken place.
6. Documents: Link to documents attached to deposition entry.
7. Action: **Action** icon; the menu contains Edit, Delete, Select Documents, and Attach Documents.

Clicking the Add Deposition button allows the entry of the following information:

Under the general tab of the Add Deposition panel -

Edit Form

GENERAL | COURT/TRANSCRIPT

Date Entered: * 04/05/2023 **1**

Type: * **2**

Method of Service: * **3**

Date Served: __/__/__ **4**

Case Calendar:

5

On __/__/__

On or Before __/__/__

Within 0 days from __/__/__

Date To Comply: **6**

Date Scheduled: **7** **NEW** HISTORY

Comments: **8**

Exhibits: **9**

Served By: **10** ALL PLAINTIFFS ALL DEFENDANTS ALL PARTIES

| | | |
|--------------------------|------------------------|--------------------|
| <input type="checkbox"/> | Swanson, Todd | (P)-Owner/Operator |
| <input type="checkbox"/> | Robinson, Terry-Ann I. | (D)-Operator |

Deponents: * **11** Party Expert Non Parties 3rd Party Defendants

12 ALL PLAINTIFFS ALL DEFENDANTS ALL PARTIES

| | | |
|--------------------------|------------------------|--------------------|
| <input type="checkbox"/> | Swanson, Todd | (P)-Owner/Operator |
| <input type="checkbox"/> | Robinson, Terry-Ann I. | (D)-Operator |

Testify For: ALL PLAINTIFFS ALL DEFENDANTS ALL PARTIES **13**

SAVE & ADD NEW **SAVE** **CANCEL**

1. Date Entered: Date the deposition is entered.
2. Type: Type of deposition noticed.
3. Method of Service: Method of service for the deposition notice.
4. Date Served: Date deposition notice was served.
5. Case Calendar: How the deposition is to be calendared in the case: On a specific date, on or before a specific date, or within a number of days from a specific date.
6. Date to Comply: Last date to comply with the deposition notice. This date is automatically calculated based on the information entered in the Case Calendar field.
7. Date Scheduled: Date deposition is scheduled. Deposition can be added directly to the case calendar from this screen by clicking on the New button.
8. Comments: Comments regarding the deposition.
9. Exhibits: Exhibits required for the deposition.
10. Served by: The party who served the deposition.
11. Deponents: The deponent's role in the case: a case party, an expert, a non-party, or a third-party defendant; and
12. The name of the person being deposed.
13. Testify for: If any role other than a case party is selected as the deponent, which party the testimony is on behalf of.

Edit Form

GENERAL
COURT/TRANSCRIPT

Court Reporter: 1

Agency:

Video Recorded?: 2

Video Operator:

Company:

Translator?: 3

Translator:

Agency:

Full: Yes No N/A ?

CT: Yes No N/A ? 4

PTX: Yes No N/A ?

Video: Yes No N/A ?

5 Plaintiff Defendant Non Parties

6 Executed Waived

Transcript Requested: 7

Transcript Received: 8

Transcript To Client: 9

Executed Transcript Received: 10

Executed Transcript To Defense Attorney: 11

Executed Date: 12

Exhibits: 13 Yes No N/A ?

Synched: 14 Yes No N/A ?

Summary: 15 Yes No N/A ?

Related Documents: 16 ATTACH SELECT

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |

SAVE & ADD NEW
SAVE
CANCEL

1. Court Reporter and Agency: The names of the court reporter and court reporting agency who attended the deposition.
2. Video Recorded?, Video Operator, and Company: Indication as to whether or not the deposition was video recorded. The names of the video operator and video recording agency who attended the deposition.
3. Indication as to whether or not the a translator was present at the deposition. The names of the translator and translation agency who attended the deposition.
4. Information regarding the file formats of the deposition and transcripts.
 - Full: Full transcript has been received.
 - CT: Condensed transcript has been received.
 - PTX: E-transcript file has been received.
 - Video: If deposition was video taped, copy of video has been received.
5. Whether the Deposed Person was a plaintiff, defendant, or non-party.
6. Indication of whether the deposition signature was executed or waived
7. Date the deposition transcript was requested
8. Date the deposition transcript was received
9. Date the deposition transcript was sent to the client for execution
10. Date the executed deposition transcript was received from client
11. Date the executed deposition transcript was sent to defense counsel
12. Date the deposition transcript was executed
13. Exhibits: If exhibits were entered during the deposition, copies of the exhibits have been received.
14. Synched: The deposition video and transcript been synched for use with Trial Director or OnCue.
15. Summary: The deposition has been summarized.
16. Attach a document to the deposition entry and the case or selection of a document already attached to the case.

Depositions and Motions entered on the Litigation Screen are Synced to the Calendar

Discovery

The Discovery screen allows for the viewing and recording of discovery requests and compliance within a case.

Structure of This Page

| ADD DISCOVERY | | | | | | | | | | Export | |
|---|---|--|--|--|---|--|--|--|--|--------|--|
| Date Entered 1 | Type 2 | Respondents 3 | Served By 4 | Description 5 | Demand/Ord 6 | Date Type 7 | Date To Com 8 | Documents 9 | Complied 10 | Action | |
| > | 4/5/2023 | Plaintiffs Interrogatories | Robinson, Terry-Ann I. | Swanson, Todd | 4/5/2023 | On/Within | 4/6/2023 | | No | | |

1. Date the discovery request was entered
2. Type of discovery
3. Respondent
4. Party who requested the discovery
5. Description of the discovery
6. The date of the discovery demand or order
7. Compliance date type
8. Date to comply with discovery request
9. Link to documents attached to the discovery request
10. Indication as to compliance with discovery request

Adding Discovery Requests

Clicking the Add Discovery button allows for the entry of the following information:

Add Discovery

1

Demand Order

2 Date: * 04/05/2023

Type: * **3** Plaintiffs Interrogatories

Method Of Service: * **4** E-mail

Case Calendar On On or Before 04/06/2023 Within 0 days from

5 Date To Comply **6** 04/06/2023 **7** Critical Deadline? **APPOINTMENT**

Date Scheduled **8** **HISTORY**

Description: **9**

10

Served By **ALL PLAINTIFFS** **ALL DEFENDANTS** **ALL PARTIES**

| <input type="checkbox"/> | Type | Name | Role |
|-------------------------------------|------|------------------------|--------------------|
| <input type="checkbox"/> | D | Robinson, Terry-Ann I. | (D)-Operator |
| <input checked="" type="checkbox"/> | P | Swanson, Todd | (P)-Owner/Operator |

Respondent Party Non Parties **11**

12 **ALL PLAINTIFFS** **ALL DEFENDANTS** **ALL PARTIES**

| <input type="checkbox"/> | Type | Name | Role |
|-------------------------------------|------|------------------------|--------------------|
| <input checked="" type="checkbox"/> | D | Robinson, Terry-Ann I. | (D)-Operator |
| <input type="checkbox"/> | P | Swanson, Todd | (P)-Owner/Operator |

13 **ATTACH** **SELECT**

Related Documents:

| Type | Description | Category | Sub-Category | Origin | From | To | Direction | Actions |
|-------------------------------------|-------------|----------|--------------|--------|------|----|-----------|---------|
| None of the Documents were selected | | | | | | | | |

1. Indication as the the discovery request is by demand of a party to the case or by order from a judge
2. Date the discovery request was entered
3. Type of discovery
4. Method of service
5. How the discovery request is to be calendared in the case: On a specific date, on or before a specific date, or within a number of days from a specific date
6. Last date to comply with the discovery request
7. Indication as to whether the date to comply should be added as a critical deadline in the case
8. Date discovery request is scheduled. the request can be added directly to the case calendar from this screen by clicking on the Appointment button.
9. Description of the discovery requested
10. Which party requested the discovery
11. Indication as to whether the respondent to the discovery request is a party or non-party
12. The respondent
13. Attach a document to the discovery entry and the case or selection of a document already attached to the case.

After a discovery request has been entered, expanding the row reveals a sub-table which allows the recording of the following information:

| Respondent | Comments | Superseded/Waived | Complied/Held Date | Actions |
|------------------------|----------|-------------------|--------------------|---------|
| Robinson, Terry-Ann I. | | | | |

Edit Respondent



Respondent: * Robinson, Terry-Ann I. **1**

Discovery To Client: **2**

Client Conf. Date: **3**

Received from Client: **4**

5

Complied Superseded Waived **6** Date

Due Date

On or before 4/6/2023 **6**

APPOINTMENT **DELETE CRITICAL DEADLINE**

Comments: **7**

SAVE **CANCEL**

1. The respondent
2. Date discovery request was sent to the client
3. Date of the client conference related to this discovery request
4. Date discovery responses are received from the client
5. Indication as to whether the request has been superseded, waived or complied with
6. Add date to comply with discovery request to the case calendar
7. Comments

How to Enter Discovery Information

Evidence

This page is currently under construction. Check back for updates!

Experts

This page is currently under construction. Check back for updates!

Hearings

This page is currently under construction. Check back for updates!

Motions

The Motions page allows you to view and record the details of motions in the case. The page includes motions served on your firm in addition to those initiated by your firm. Note that orders to show cause are also recorded on this page in the Motions table, even though they are not technically motions. This manual will follow the convention of the SmartAdvocate system and use "motion" to describe any action requesting a judge's decision. To distinguish between actual motions and orders to show cause, use the [Category] field in [The Add/Edit Motion Panel](#).

The Structure of This Page

| Add Motion 1 | | Motions | | | | | | Support |
|--------------------------------|--------------------|---|--|-------------------|---------------------------------|----------|----------------|---------|
| Motion | Date Sent/Received | Movants | Respondents | Return Date | Documents | Comments | Relief Granted | |
| Summary Judgment (Unspecified) | 5/3/2018 | Gingelhyman, John A. Gingelhyman, Smaryna Marko, Rodney | Gingelhyman, John A. Gingelhyman, Smaryna Ropwood, Harry Spella, Mary-Ann | 6/8/2018 2 | Notice of Hearing - Arbitration | | Partial | |
| Default (Submission) | 4/2/2018 | Gingelhyman, John A. Gingelhyman, Smaryna Marko, Jenny Marko, Rodney | Ropwood, Harry Spella, Mary-Ann | 4/27/2018 | | | Partial | |

1. Add Motion button. Used to add a motion to the case file. See [Adding a Motion](#).
2. Motions table. Contains the motion details and allows various actions to be performed on them. See [Motions Table](#).

Motions Table

The Motions table is where the details of motions are stored. Each row of the table represents an individual motion. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Motions table contains the following available columns:

| Motion | Date Sent/Received | Movants | Respondents | Return Date | Documents | Comments | Relief Granted |
|--|--------------------|---|---|-------------|---------------------------------|----------|----------------|
| Summary Judgment (Unspecified) | 5/3/2018 | Gingelkrom, John A. Gingelkrom, Emeryna Marko, Rodney | Gingelkrom, Emeryna Rappold, Mary Szele, Mary-Ann | 6/8/2018 | Notice of Hearing - Arbitration | | Partial |
| Default (Submission) | 4/2/2018 | Gingelkrom, John A. Gingelkrom, Emeryna Marko, Jenny Marko, Rodney | Rappold, Mary Szele, Mary-Ann | 4/27/2018 | | | Partial |
| Affidavit in support of motion (Unspecified) | 5/3/2018 | Gingelkrom, John A. | | | | | Partial |

1. Motion: The type of the motion and the form of the motion. If the [Form] field in [The Add/Edit Motion Panel](#) is left blank, this column behaves as though Submission were selected.
2. Date Sent/Received: The date on which the motion was sent or received by your firm.
3. Movants: The parties that initiated the motion.
4. Respondents: The parties against whom the motion was filed.
5. Return Date: The date the motion is to be heard by the court.
6. Documents: The documents associated with the motion.
7. Comments: Any comments about the motion.
8. Relief: Whether the court granted or denied relief, or partially granted or denied relief.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit, Delete, and Select Documents.

Editing a Motion

To edit a motion:

1. Click the [right-click icon](#) in the untitled column of the row representing the motion you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for motions, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Motion Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Motion

To delete a motion:

1. Click the [right-click icon](#) in the untitled column of the row representing the motion you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the motion, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Motion

To add a new motion:

1. Click the Add Motion button. This will bring up an Add/Edit panel for motions, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Motion Panel](#) for details about the fields.
3. Click Save to save the motion and close the panel.
 - If you decide you do not wish to save the motion, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Motion Panel

The Add/Edit Motion Panel allows you to fill in the details of a motion. Note: When adding a new motion, the panel that appears is a combination of this panel and [The Add/Edit Respondent Panel](#). This panel appears alone when editing an existing motion. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

✕

Motion **1**
 Order to Show Cause

Type:* **3**

Submission **2**
 Oral
 Unspecified

Date Sent/Received **4**

Movants:*

| # | Type | Name | Role |
|---|------|------|------|
| | | | |

| | | | |
|-------------------------------------|---|--------------------------------|--------------------|
| <input checked="" type="checkbox"/> | P | Ginglehymmer, John A. | (P)-Owner/Operator |
| <input checked="" type="checkbox"/> | P | Ginglehymmer, Smeryna 5 | (P)-Passenger |
| <input checked="" type="checkbox"/> | P | Marks, Rodney | (P)-Passenger |

Return Date: **6** 06/08/2018

Method of Service: Fax; **7** Court Filing Completed: 05/08/2018 E-File **9**

Opposition Due: **10**/___/___ Critical Deadline **11** Cross Motion Received **12**

Reply Due: **13**/___/___ Critical Deadline **14**

| Respondent | Served/Received | Opposition (S/R) | Reply (S/R) | Comments | Action |
|-----------------------|-----------------|------------------|-------------|----------|---|
| | ___/___/___ | ___/___/___ | ___/___/___ | | <input type="checkbox"/> <input type="checkbox"/> |
| Ripspeed, Mary | | | | | <input type="checkbox"/> <input type="checkbox"/> |
| Spells, Mary-Ann | | | 15 | | <input type="checkbox"/> <input type="checkbox"/> |
| Ginglehymmer, Smeryna | 5/4/2018 | 5/14/2018 | 5/23/2018 | | <input type="checkbox"/> <input type="checkbox"/> |

Decision/Order **16**

Received from Court Received from Other Parties

Relief Granted: Yes No Partial **17**

Decision/Order Date: 06/08/2018 **18** Order Received: ___/___/___ **19**

Order Sent: 06/18/2018 **20** Order Served: 06/18/2018 **21**

Method of Service: E-mail; **22** Court Order Filed: 06/18/2018 E-File

Last Date to Comply with Order: **24**/___/___ Critical Deadlines for: **25**/___/___

Settle Order **26**

Last Date to Settle: ___/___/___ **27** Critical Deadline **28**

Settlement Date: ___/___/___ **29**

Order Date: ___/___/___ **30**

Last Date for Notice of Appeal: **31**/___/___ Critical Deadline **32**

Comments:

33

Related Documents:

| Description | Category | Sub-Category | Ext | To | From | Origin | Direction | # |
|---------------------------------|----------------|------------------|---------------|-----------------------|-----------------|--------|-----------|---|
| Notice of Hearing - Arbitration | Correspondence | Letter To Client | Doc 34 | Ginglehymmer, John A. | SmartAdvoca LLC | Docume | Outgoing | |

1. [Category]: Whether the action is a motion or an order to show cause.
2. [Form]: Whether the motion is made by submitting on the papers, oral argument is requested, or it is unspecified.
3. Type: The type of the motion.
4. Date Sent/Received: The date the motion was sent or received by your firm.

5. Movants: The parties that initiated the motion. Clicking the All Plaintiffs button selects all plaintiffs in the case and deselects all defendants. Clicking the All Defendants button selects all defendants in the case and deselects all plaintiffs. Clicking the All Parties button selects all plaintiffs and all defendants in the case.
6. Return Date: The date the motion is to be heard by the court. This field cannot be edited directly; to edit it, click the Add or Edit button to the right of the field, which will open an Add/Edit Appointment Panel. This field will automatically contain the start date of the appointment created through the panel. Click the History button to the right of the panel to view the appointment history of the appointment created through this panel.
7. Method of Service: The method of service of the notice of motion or order to show cause.
8. Court Filing Completed: The date the motion papers were filed with the court.
9. E-File: Whether the motion or order to show cause was filed electronically.
10. Opposition Due: The deadline to serve opposition papers on the motion.
11. Critical Deadline [Opposition]: Whether SmartAdvocate should create a Critical Deadline from the Opposition Due date.
12. Cross Motion Received: Whether a cross motion was filed in response to the motion. If this box is checked, a comment box opens, permitting the entry of information about the cross motion.
13. Reply Due: The deadline to serve reply papers on the motion.
14. Critical Deadline [Reply Due]: Whether SmartAdvocate should create a Critical Deadline from the Reply Due date.
15. [Respondent Table]: A table allowing you to enter the parties who are respondents in the motion or order to show cause. The first row of the table permits the entry of the respondents; subsequent rows list parties already listed as respondents and allows them to be edited or deleted.
16. Decision/Order: Whether the court's decision or order was received from the court or from other parties.
17. Relief Granted: Whether the court order or decision granted, denied, or partially granted and denied the relief requested in the motion or order to show cause.
18. Decision/Order Date: The date of the court's decision or order.
19. Order Received: The date the court's order was received by your firm.
20. Order Sent: The date the court's order was sent to your adversary by your firm.
21. Order Served: The date the court's order was served on or by your firm.
22. Method of Service: The method of service of the Court's order.
23. Court Order Filed: The date on which the court's order was filed.
24. Last Date to Comply with Order: The last date on which compliance with the court's order is required.
25. Critical Deadlines for: A multi-choice dropdown listing all parties, which creates a critical deadline for compliance with the court's order for those parties chosen.
26. Settle Order: Whether it is required to settle with your firm's adversary on the form of the order.
27. Last Date to Settle: The date by which the parties must settle on the form of the court order. This field is uneditable unless the Settle Order box is checked.
28. Critical Deadline [Settle Order]: Whether a Critical Deadline should be created from the Last Date to Settle.
29. Settlement Date: The date on which the parties settled on the form of the court order.
30. Order Date: The date of the court order.
31. Last Date for Notice of Appeal: The last date on which an appeal of the court order can be filed.
32. Critical Deadline [Appeal]: Whether a Critical Deadline should be created from the Last Date for Notice of Appeal.
33. Comments: Any comments about the motion or order to show cause.
34. Related Documents: Tool for adding and tracking documents.

Outstanding Items

This page is currently under construction. Check back for updates!

The Outstanding Items Page

Trial Prep

This page is currently under construction. Check back for updates!

Verdict

The Verdict page allows you to view and record the details of the verdict in the case.

The Structure of This Page

Note: The Add Defendant Details [Verdict] button, Defendant Details [Verdict] table, Add Plaintiff Details button, and Plaintiff Details table are all associated with an individual row of the Verdicts table, and only appear if the row is set to display subtables. Additionally, the Add Defendant Details [Plaintiff] button, Defendant Details [Plaintiff] table, Add Interest Details, and Interest Details table are all associated with an individual row of an individual Plaintiff Details table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Verdicts page, and where in the Verdicts or Plaintiff Details table they appear, will depend on which row, if any, of the Verdicts and Plaintiff Details tables is set to display subtables. See [Subtables and the Open/Closed Column](#).

| Verdict | Verdict Date | Verdict Type | Judgment Date | Type | Amount | Description | Last Date to File Proposed Counter Judgment | Last Date for Post-Trial Motion | Last Date to File Notice of Appeal | Comments |
|-----------------------------------|--------------|--------------|---------------|-----------------------|--------------|---|---|---------------------------------|------------------------------------|----------|
| Open Plaintiff Basis 4/19/2018 | 4/19/2018 | Plaintiff | 4/24/2018 | Liability and Damages | \$147,088.00 | Any medical fees not covered by the defendant's health insurance, as the amount of \$147,088.00, based on any awards. | | | 5/24/2018 | |

| Defendant | Plaintiff | % of Fault |
|----------------|--|------------|
| Ripspeed, Mary | Cinghiamme, John A. Cinghiamme, Carmenia Moran, Torrey | 100.00 |

| Plaintiff | Verdict Amount | Pain and Suffering | Lost Earnings | Medicals | Other Out-of-Pocket | Comments |
|----------------------|---|--------------------|-------------------|-------------------|---------------------|----------|
| Cinghiamme, Carmenia | Verdict Amount: \$120,000.00 Percent Of Fault: 1.00% | Pain: \$50,000.00 | Pain: \$12,045.00 | Pain: \$235,14.00 | Pain: \$34,555.00 | |

| Defendant | Defendant's % of Fault | Amount to Be Paid | Actual Amount to Be Paid |
|----------------|------------------------|-------------------|--------------------------|
| Ripspeed, Mary | 100.00 | \$125,000.00 | \$125,000.00 |

| Type | Interest From | Interest To | Interest % | Interest on Amount | Total Interest % | Total Amount |
|---|---------------|-------------|------------|--------------------|------------------|--------------|
| Future Lost Earnings; Future Medical; Future Other Out-of-Pocket; Future Pain & Suffering | 3/17/2017 | 3/19/2018 | 7.50 | \$62,000.00 | 0.00 | |
| Property Damage & Other | 4/12/2013 | 4/16/2018 | 8.00 | \$150,000.00 | 0.00 | |

| Verdict | Verdict Date | Verdict Type | Judgment Date | Type | Amount | Description | Last Date of File Proposed Counter Judgment | Last Date for Post Trial Motion | Last Date to File Notice of Appeal | Comments |
|------------------------------------|--------------|--------------|---------------|-----------------------|--------------|--|---|---------------------------------|------------------------------------|----------|
| Type: Plaintiff Date: 3/13/2018 | 3/13/2018 | Plaintiff | 4/24/2018 | Liability and Damages | \$147,500.00 | Jury verdict finding defendant 100% liable and damages in the amount of \$147,500. Court entered judgment based on jury verdict. | | | 5/24/2018 | |

1. Add Verdict button. Used to add a new verdict to the case file. See [Adding a Verdict](#).
2. Verdicts table. Contains the verdict details and allows various actions to be performed on them. See [Verdicts Table](#).
3. Add Defendant Details [Verdict] button. Used to add basic details about a defendant's percentage of fault in a verdict for the plaintiff to the case file. See [Adding Basic Defendant Details](#).
4. Defendant Details [Verdict] table. Contains basic details about the defendants' percentage of fault in a verdict for the plaintiff and allows various actions to be performed on them. See [Defendant Details \[Verdict\] Table](#).
5. Add Plaintiff Details button. Used to add a plaintiff's damages in a verdict for the plaintiff to the case file. See [Adding Plaintiff Damages](#).
6. Plaintiff Details table. Contains the details of a plaintiff's damages in a verdict for the plaintiff and allows various actions to be performed on them. See [Plaintiff Details Table](#).
7. Add Defendant Details [Plaintiff] button. Used to add details about a defendant's fault in a particular plaintiff's damages in a verdict for the plaintiff to the case file. See [Adding Defendant Details](#).
8. Defendant Details [Plaintiff] table. Contains details about defendants' fault in a particular plaintiff's damages in a verdict for the plaintiff and allows various actions to be performed on them. See [Defendant Details \[Plaintiff\] Table](#).
9. Add Interest Details button. Used to add a new assessment of interest on damages in a verdict for the plaintiff to the case file. See [Adding Interest](#).
10. Interest Details table. Contains the details of interest on damages in a verdict for the plaintiff and allows various actions to be performed on them. See [Interest Details Table](#).

Verdicts Table

The Verdicts table is where the details of the verdict are stored. Each row of the table represents an individual verdict (there may be more than one row if, for example, some defendants are judged at fault and others are not). See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Verdicts table contains the following available columns:

| Verdict | Verdict Date | Verdict Type | Judgment Date | Type | Amount | Description | Last Date of File Proposed Counter Judgment | Last Date for Post Trial Motion | Last Date to File Notice of Appeal | Comments |
|------------------------------------|--------------|--------------|---------------|-----------------------|--------------|--|---|---------------------------------|------------------------------------|----------|
| Type: Plaintiff Date: 3/13/2018 | 3/13/2018 | Plaintiff | 4/24/2018 | Liability and Damages | \$147,500.00 | Jury verdict finding defendant 100% liable and damages in the amount of \$147,500. Court entered judgment based on jury verdict. | | | 5/24/2018 | |

1. [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Defendant Details, Plaintiff Details and, under Plaintiff Details, Defendant Details [Plaintiff] and Interest Details for that Verdict). Clicking on the plus sign opens the subtables for that verdict. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
2. Verdict: The type and date of the verdict.
3. Verdict Date: The date of the verdict.
4. Verdict Type: The type of the verdict.
5. Judgment Date: The date of the judgment.
6. Type: Whether the verdict covered the question of liability, of damages, or of both.
7. Amount: The amount of the judgment.
8. Description: The description of the verdict.
9. Last Date of File Proposed Counter Judgment: The deadline to file a proposed counter judgment.
10. Last Date for Post Trial Motion: The deadline to make post-trial motions.
11. Last Date to File Notice of Appeal: The deadline to file a notice of appeal.
12. Comments: Any comments about the verdict.
13. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.



Additional columns are available for the Verdicts table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Abstract Received, Bill of Cost Method of Service, Entered Judgment & Bill of Cost Served/Received, Judgment Settlement, Last Date for Settle Judgment, Payment of Judge Due, Proposed Counter Judgment Method of Service, Proposed Counter Judgment Served/Received, Proposed Judgment Method of Service, Proposed Judgment Served/Received.

Editing a Verdict

To edit a verdict:

1. Click the [right-click icon](#) in the untitled column of the row representing the verdict you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for verdicts, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Verdict Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Verdict

To delete a verdict:

1. Click the [right-click icon](#) in the untitled column of the row representing the verdict you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).

3. Click the OK button in the message to confirm the deletion.

- If you decide you do not wish to delete the verdict, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

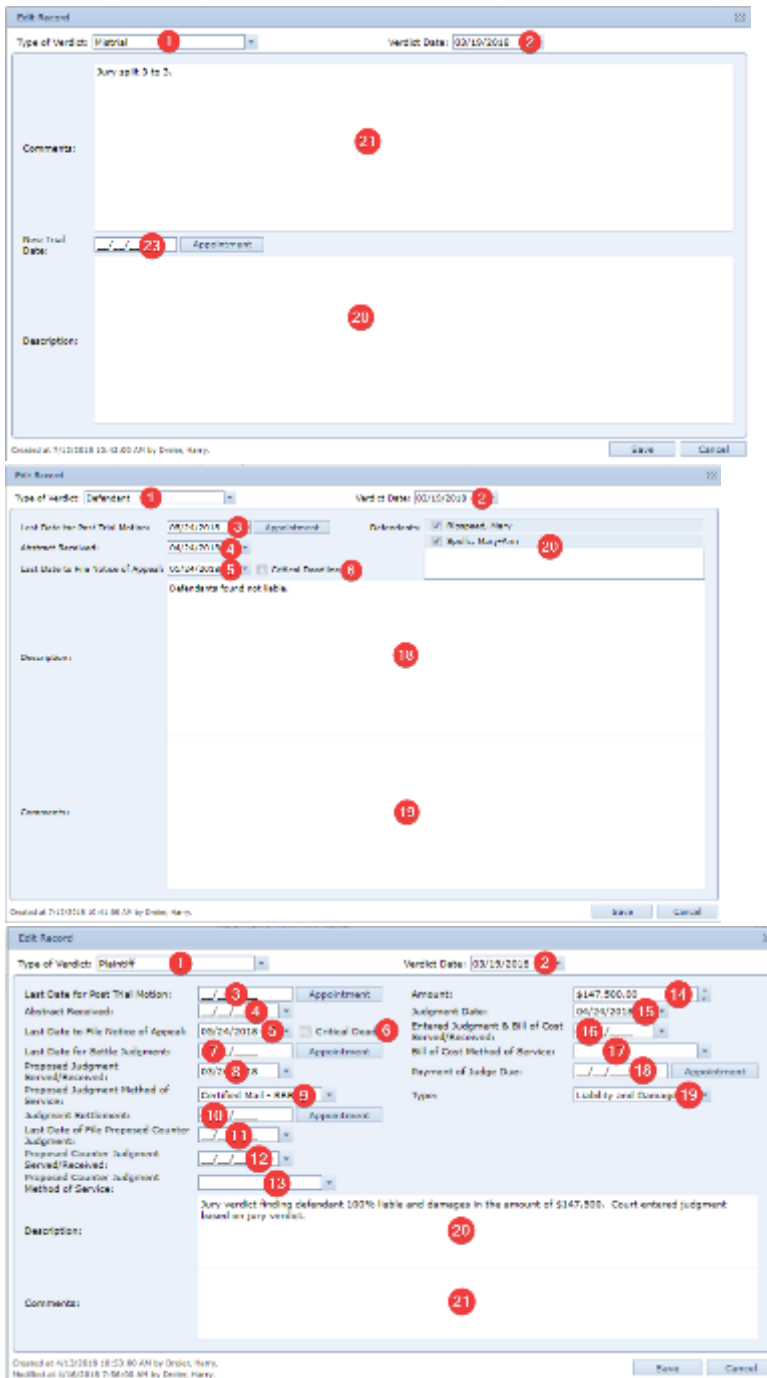
Adding a Verdict

To add a new verdict:

1. Click the Add Verdict button. This will bring up an Add/Edit panel for verdicts, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Verdict Panel](#) for details about the fields.
3. Click Save to save the verdict and close the panel.
 - If you decide you do not wish to save the verdict, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Verdict Panel

The Add/Edit Verdict Panel allows you to fill in the details of a verdict. The fields that appear in the panel differ significantly depending on whether the verdict is for the plaintiff, for the defendant, or a mistrial. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Type of Verdict: The type of the verdict.
2. Verdict Date: The date of the verdict.
3. Last Date for Post Trial Motion: The deadline to make post-trial motions. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear if Mistrial is selected in Type of Verdict.

4. Abstract Received: The date your firm received the abstract of the judgment. This field does not appear if Mistrial is selected in Type of Verdict.
5. Last Date to File Notice of Appeal: The deadline to file a notice of appeal. This field does not appear if Mistrial is selected in Type of Verdict.
6. Critical Deadline: Whether the deadline to file a notice of appeal should be considered a critical deadline for the case. If this field is selected, a corresponding critical deadline will automatically be created on the Critical Deadlines page, set to the date in the Last Date to File Notice of Appeal field. This field does not appear if Mistrial is selected in Type of Verdict.
7. Last Date for Settle Judgment: The deadline to settle the judgment. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Plaintiff is selected in Type of Verdict.
8. Proposed Judgment Served/Received: The date the proposed judgment was served or received by your firm. This field does not appear unless Plaintiff is selected in Type of Verdict.
9. Proposed Judgment Method of Service: The method of service of the proposed judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
10. Judgment Settlement: The date of settlement of the judgment. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Plaintiff is selected in Type of Verdict.
11. Last Date of File Proposed Counter Judgment: The deadline to file a proposed counter judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
12. Proposed Counter Judgment Served/Received: The date the proposed counter judgment was served or received by your firm. This field does not appear unless Plaintiff is selected in Type of Verdict.
13. Proposed Counter Judgment Method of Service: The method of service of the proposed counter judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
14. Amount: The amount of the judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
15. Judgment Date: The date of the judgment. This field does not appear unless Plaintiff is selected in Type of Verdict.
16. Entered Judgment & Bill of Cost Served/Received: The date the notice of entry of the judgment and bill of costs were served or received by your firm. This field does not appear unless Plaintiff is selected in Type of Verdict.
17. Bill of Cost Method of Service: The method of service of the bill of costs. This field does not appear unless Plaintiff is selected in Type of Verdict.
18. Payment of Judge Due: The deadline to pay the judge (if the case was heard by a private judge). Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Plaintiff is selected in Type of Verdict.
19. Type: Whether the verdict covered the question of liability, of damages, or of both. This field does not appear unless Plaintiff is selected in Type of Verdict.
20. Description: The description of the verdict.
21. Comments: Any comments about the verdict.
22. Defendants: The defendants covered by the verdict. This field does not appear unless Defendant is selected in Type of Verdict.
23. New Trial Date: The date a retrial is scheduled to begin. Clicking the Appointment button to the right of this field will open an Add/Edit Appointment panel for a new appointment with Trial selected as the Activity Type; this field will contain the date of the created appointment. This field does not appear unless Mistrial is selected in Type of Verdict.

Probate/Surrogate

Decedent Information

The Decedent Information page allows you to view and record the details of deceased plaintiffs, including burial and autopsy details, and assets held by the plaintiff at the time of death.

The Structure of This Page

Note: The Add Funeral Expense button, Funeral Expenses table, Add Asset button, and Assets table are all associated with an individual row of the Decedent Information table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Decedent Information page, and where in the Decedent Information table they appear, will depend on which row, if any, of the Decedent Information table is set to display subtables. See [Subtables and the Open/Closed Column](#).

| Add Decedent Information | Decedent Information | | | | | | | | | |
|--------------------------|--|------------------------|---------------|--------------------|----------------------|--------------|---------------------------|---|-----|--------------------------------------|
| Decedent | Unread Info | Death Certificate Date | Date of Death | Died From Incident | Location of Death | Residence | Have Original Certificate | Autopsy Done | | |
| Englishman, Jerome | DOB: 10/22/1974 Age: 42 year(s), 8 month(s), 128 day(s) | 8/23/2017 | 8/23/2017 | Yes | Prager Dorn Hospital | New York, NY | No | Receivd Date: 2/12/2018 Reported Date: 2/12/2018 | Yes | Independent Medical Examinations, PC |

| Add Funeral Expense | Funeral Expenses | | | | | | | | | | | | |
|---------------------|--------------------|---------------------|-------------|----------------------------------|-----------|-------------|------------|---------|--------------|--------------|---------|--------|----------|
| Expense/Claim Type | Add/Claim Received | Payor | Bill Amount | Payee | Bill Paid | Amount Paid | Adjustment | Balance | Use Confirms | Bill/Claim # | Check # | Linear | Comments |
| Funeral Home | 1/15/2018 | Englishman, John A. | \$8,900.00 | Charlie's Funeral Services, Inc. | Yes | \$8,900.00 | \$890.00 | \$0.00 | No | 12345 | 9876 | | |

| Add Asset | Assets | | | | | | | | | | | | |
|------------|--------------|------------------------------------|---------------------|--------------------|---------------|--------|----------|--|--|--|--|--|-----------------------|
| Asset Type | Asset Value | Asset Location | Co-Owner | Law Firm | Attorney | File # | Comments | | | | | | |
| Building | \$200,000.00 | 123 Main Street, Anytown, NY 12345 | Englishman, John A. | Davis Cheam & Ross | Smith, Marcia | | | | | | | | |
| Automobile | \$8,900.00 | | | | | | | | | | | | 2008 Chevrolet Impala |

1. Add Decedent Information button. Used to add a new decedent to the case file. See [Adding a Decedent](#).
2. Decedent Information table. Contains the decedent details and allows various actions to be performed on them. See [Decedent Information Table](#).
3. Add Funeral Expense button. Used to add a new funeral-related expense to the case file. See [Adding a Funeral Expense](#).
4. Funeral Expenses table. Contains the details of funeral-related expenses for a particular decedent and allows various actions to be performed on them. See [Funeral Expenses Table](#).
5. Add Asset button. Used to add a decedent's asset to the case file. See [Adding an Asset](#).
6. Assets table. Contains the asset details for a particular decedent and allows various actions to be performed on them. See [Assets Table](#).

The Decedent Information table is where the details of deceased plaintiffs are stored. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Decedent Information table contains the following available columns:

| Add Decedent Information | | Decedent Information | | | | | | | | | | Buttons | |
|--------------------------|---|----------------------|---|---|---|---|---|---|----|----|--|---------|--|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | | | |

1. [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Funeral Expenses and Assets for that decedent). Clicking on the plus sign opens the Funeral Expenses and Assets subtables for that decedent. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
2. Decedent: The name of the deceased plaintiff.
3. Decedent Info: The decedent's date of birth, and the decedent's age at the date of death.
4. Death Certificate Date: The date the decedent's death certificate was signed.
5. Date of Death: The decedent's date of death.
6. Died from Incident: Whether the decedent's death was as a result of the inciting incident of the case.
7. Location of Death: The location of the decedent's death.
8. Residence: The city and state of the decedent's primary residence at the date of death.
9. Have Original Certificate: Whether your firm has the original death certificate for the decedent, and either the date the certificate was received by your firm (if your firm has the certificate), or the dates that the certificate was requested by your firm and is expected to be received by your firm (if your firm does not have the certificate).
10. Autopsy Done: Whether an autopsy was performed on the decedent and who performed it.
11. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.
12. Additional columns are available for the Lien Tracking table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Cemetery, Funeral Date, Funeral Home, OCME No.

Editing a Decedent

To edit a decedent:

1. Click the [right-click icon](#) in the untitled column of the row representing the decedent you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for decedents, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Decedent Information Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Decedent

To delete a decedent:

1. Click the [right-click icon](#) in the untitled column of the row representing the decedent you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the decedent, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Decedent

To add a new decedent:

1. Click the Add Decedent Information button. This will bring up an Add/Edit panel for decedents, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Decedent Information Panel](#) for details about the fields.
3. Click Save to save the decedent and close the panel.
 - If you decide you do not wish to save the decedent, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.
 - The date in the Date of Death field will automatically be set as the date of death in the decedent's [Contact Card](#). This will also set the Sub Category in the contact card to Deceased, if that was not already the case.

The Add/Edit Decedent Information Panel

The Add/Edit Decedent Information Panel allows you to fill in the details of a deceased plaintiff. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Decedent: The deceased plaintiff. This field is uneditable when editing an existing decedent record.
2. Date of Death: The decedent's date of death.
3. Location of Death: The location of the decedent's death.
4. We Have Original Certificate: Whether your firm has the original death certificate for the decedent.
5. Requested Date: The date the death certificate was received by your firm. This field does not appear if We Have Original Certificate is selected.
6. Expected Date: The date the death certificate is expected to be received by your firm. This field does not appear if We Have Original Certificate is selected.

Decedent Died from Incident: Whether the decedent's death was as a result of the inciting incident of the case.

1. Funeral Date: The date of the decedent's funeral.
2. Death Certificate Date: The date the decedent's death certificate was signed.
3. Funeral Home: The funeral home at which the funeral was performed.
4. Cemetery: The cemetery in which the decedent is buried.
5. Autopsy Done: Whether an autopsy was performed on the decedent.
6. Who Performed: The contact who performed the autopsy on the decedent. This field does not appear unless Autopsy Done is selected.
7. OCME No: The medical examiner's case number for the autopsy. This field does not appear unless Autopsy Done is selected.

Funeral Expenses Table

The Funeral Expenses table is where the details of funeral-related expenses are stored. The Funeral Expenses table is a subtable of the [Decedent Information Table](#), which means that each row of the Decedent Information table has an individual Funeral Expenses table associated with it, which is specific to the decedent in that row; open a row of the Decedent Information table using the open/close icon to reveal the associated Funeral Expenses table. Each row of the table represents an individual expense. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Funeral Expenses table contains the following available columns:

1. Expense/Claim Type: The type of the expense.
2. Bill/Claim Received: The date the bill was received for the expense.
3. Payor: The contact who paid the bill.
4. Bill Amount: The amount of the bill.
5. Payee: The contact to be paid.
6. Bill Paid: Whether at least part of the bill was paid.
7. Amount Paid: The amount paid toward the bill.
8. Adjustment: The amount of reduction achieved in the amount of the bill.
9. Balance: The outstanding balance of the bill.
10. Lien Confirm: Whether the lien associated with the expense has been confirmed or not.
11. Bill/Claim #: The identification number of the bill.
12. Check #: The number of the check used to pay the bill.
13. Lienor: The contact holding a lien on the case associated with the expense.
14. Comments: Any comments about the expense.
15. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Funeral Expense

To edit a funeral expense:

1. Click the [right-click icon](#) in the untitled column of the row representing the expense you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for funeral expenses, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Funeral Expense Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Funeral Expense

To delete a funeral expense:

1. Click the [right-click icon](#) in the untitled column of the row representing the expense you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the expense, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Funeral Expense

To add a new funeral expense:

1. Click the Add Funeral Expense button. This will bring up an Add/Edit panel for funeral expenses, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Funeral Expense Panel](#) for details about the fields.
3. Click Save to save the expense and close the panel.
 - If you decide you do not wish to save the expense, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Funeral Expense Panel

The Add/Edit Funeral Expense Panel allows you to fill in the details of a funeral-related expense. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

1. Expense/Claim Type: The type of the expense. This list is hardcoded into SmartAdvocate and thus not editable.
2. Bill/Claim Received: The date the bill was received for the expense.
3. Payor: The contact who paid the bill.

Bill Amount: The amount of the bill.

1. Payee: The contact to be paid.
2. Bill Paid: Whether at least part of the bill was paid.
3. Amount Paid: The amount paid toward the amount of the bill. This field is blank and uneditable unless Bill Paid is selected.
4. Adjustment: The amount of reduction achieved in the amount of the bill. This field is blank and uneditable unless Bill Paid is selected.
5. Balance: The outstanding balance of the bill. This field contains the number in the Bill Amount field minus the sum of the numbers in the Amount Paid and Adjustment fields. This field is ignored if either the Amount Paid or Adjustment field is blank.
6. Lien Confirm: Whether the lien associated with the expense has been confirmed.
7. Bill/Claim #: The identification number of the bill.
8. Check #: The number of the check used to pay the bill.
9. Lienor: The contact holding a lien on the case associated with the expense.
10. Comments: Any comments about the expense.

The Assets table is where the details of major assets held by decedents are stored. The Assets table is a subtable of the [Decedent Information Table](#), which means that each row of the Decedent Information table has an individual Assets table associated with it, which is specific to the decedent in that row; open a row of the Decedent Information table using the open/close icon to reveal the associated Assets table. Each row of the table represents an individual asset. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Assets table contains the following available columns:

| Asset Type | Asset Value | Asset Location | Co-Owner | Law Firm | Attorney | File # | Comments |
|-------------|--------------|------------------------------------|----------------------|----------------------|------------------|--------|-----------------------|
| Building | \$255,000.00 | 123 Main Street, Anytown, NY 11111 | Ginglahymar, John A. | Dewey Cheatem & Howe | Spells, Mary-Ann | | |
| Automobiles | \$4,990.00 | | | | | | 2008 Chevrolet Impala |

1. Asset Type: The type of the asset.
2. Asset Value: The estimated value of the asset.
3. Asset Location: The current location of the asset.
4. Co-Owner: The co-owner of the asset.
5. Law Firm: The probate law firm assisting in the distribution of this asset.
6. Attorney: The probate attorney assisting in the distribution of this asset.
7. File #: The probate attorney's file number for the estate.
8. Comments: Any comments about this asset.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing an Asset

To edit an asset:

1. Click the [right-click icon](#) in the untitled column of the row representing the asset you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for assets, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Asset Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Asset

To delete an Asset:

1. Click the [right-click icon](#) in the untitled column of the row representing the asset you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the asset, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Asset

To add a new asset:

1. Click the Add Asset button. This will bring up an Add/Edit panel for assets, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Asset Panel](#) for details about the fields.
3. Click Save to save the asset and close the panel.
 - If you decide you do not wish to save the asset, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Asset Panel

The Add/Edit Asset Panel allows you to fill in the details of an asset. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Asset Type: Building

Asset Value: \$255,000.00

Asset Location: 123 Main Street, Anytown, NY 11111

Co-Owner: Ginglahymar, John A., 160 Broadway, New York, NY 10038

Law Firm: Dewey Cheatem & Howe, 123 Main Street, Floral Park, NY 11006

Attorney: Spells, Mary-Ann, 123 Main Street, Port Washington, NY 11050

File #:

Comments:

Created at: 4/16/2018 1:50:00 PM by Dreier, Harry.
Modified at: 4/16/2018 3:23:00 PM by Dreier, Harry.

Save Cancel

1. Asset Type: The type of the asset. This list is hardcoded into SmartAdvocate and thus not editable.
2. Asset Value: The estimated value of the asset.
3. Asset Location: The current location of the asset.
4. Co-Owner: The co-owner of the asset.
5. Law Firm: The probate law firm assisting in the distribution of this asset.
6. Attorney: The probate attorney assisting in the distribution of this asset.
7. File #: The probate attorney's file number for the estate.
8. Comments: Any comments about the asset.

Will Information

The Will Information page allows you to view and record the details of deceased plaintiffs' wills, including executors and witnesses.

The Structure of This Page

Note: The Add Executor button, Executors table, Add Witness button, and Witnesses table are all associated with an individual row of the Decedent Will Information table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Will Information page, and where in the Will Information table they appear, will depend on which row, if any, of the Decedent Information table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot displays the 'Decedent Will Information' interface. At the top is a table with columns: Decedent, Did Client Die With Will, Date of Will, Will Received, and Does Will Have Codicil. A row for 'Singh/Naras, Sheryla' is shown with a red circle '1' next to the 'Did Client Die With Will' column. Below this is the 'Executors' subtable, with an 'Add Executor' button (red circle '2') and a table with columns: Executor, Is Petitioner, Relationship, Is Our Firm Representing, Letter of Testamentary, and Comments. A row for 'Singh/Naras, John A. Sr.' is shown with a red circle '3' next to the 'Relationship' column. Below that is the 'Witnesses' subtable, with an 'Add Witness' button (red circle '4') and a table with columns: Witness For, Witness, Affidavit Requested, Affidavit Expected, Affidavit Received, Affidavit Filed, and Comments. A row for 'SINGHON, CLAUDE K.' is shown with a red circle '5' next to the 'Affidavit Expected' column.

1. Decedent Will Information table. Contains the will details and allows the details to be edited. See [Decedent Will Information Table](#).
2. Add Executor button. Used to add a new executor to the case file. See [Adding an Executor](#).
3. Executors table. Contains the executor details for a particular decedent's will and allows various actions to be performed on them. See [Executors Table](#).
4. Add Witness button. Used to add a new witness to the case file. See [Adding a Witness](#).
5. Witnesses table. Contains the witness details for a particular decedent's will and allows various actions to be performed on them. See [Witnesses Table](#).



Decedent Will Information Table

The Decedent Will Information table is where the details of decedents' wills are stored. Each row of the table represents an individual decedent. It is not possible to directly add or delete a row from this table; there is automatically a row in this table for each row representing a decedent in the [Decedent Information Table](#) on the [Decedent Information](#) case page. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Decedent Will Information table contains the following available columns:

The screenshot shows the 'Decedent Will Information' table with red circles highlighting specific columns: 1. The first column (no title) containing a plus sign icon. 2. The 'Decedent' column. 3. The 'Did Client Die With Will' column. 4. The 'Date of Will' column. 5. The 'Will Received' column. 6. The 'Does Will Have Codicil' column. 7. The last column (no title) containing a right-click icon.

1. [column with no title]: A plus sign  in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Executors and Witnesses for that Will). Clicking on the plus sign opens the Executors and Witnesses subtables for that will. The plus sign then turns into a negative sign  which, when clicked, closes the subtable.
2. Decedent: The deceased plaintiff.
3. Did Client Die With Will: Whether the decedent left a valid will.
4. Does Will Have Codicil: Whether the decedent left at least one valid codicil amending the will.
5. Date of Will: The date the will was signed.
6. Will Received: Whether your firm has received the will, and either the date the will was received by your firm (if your firm has the will), or the dates that the will was requested by your firm and is expected to be received by your firm (if your firm does not have the will).
7. [column with no title]: [Right-click icon](#); right-click menu contains Edit.

Editing Will Information

To edit information about a decedent's will:

1. Click the [right-click icon](#) in the untitled column of the row representing the will information you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.

2. Click the Edit option in the menu. This will bring up an Add/Edit panel for will information, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Will Information Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Will Information Panel

The Add/Edit Will Information Panel allows you to fill in the details of a decedent's will. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Decedent: The deceased plaintiff.
2. Did Client Die With Will: Whether the decedent left a valid will.
3. Does Will Have Codicil: Whether the decedent left at least one valid codicil amending the will.
4. Date of Will: The date the will was signed.
5. Will Received: Whether your firm has received the will or not.
6. Requested Date: The date the will was requested by your firm. This field is uneditable unless Did Client Die With Will is selected. This field does not appear if Will Received is selected.
7. Expected Date: The date the will is expected to be received by your firm. This field is uneditable unless Did Client Die With Will is selected. This field does not appear unless Will Received is selected.

Executors Table

The Executors table is where the details of the executors of a decedent's will are stored. The Executors table is a subtable of the [Decedent Will Information Table](#), which means that each row of the Decedent Will Information table has an individual Executors table associated with it, which is specific to the decedent in that row; open a row of the Decedent Will Information table using the open/close icon to reveal the associated Executors table. Each row of the table represents an individual executor. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Executors table contains the following available columns:

1. Executor: The executor of the will and the type of the executor.
2. Is Petitioner: Whether the executor is the petitioner in the petition for probate.
3. Relationship: The executor's relationship to the decedent.
4. Is Our Firm Representing: Whether your firm represents the executor in a contested petition for probate.
5. Letter of Testamentary: The status of the letter of testamentary, whether issued to the executor, in the process of being issued to the executor, or not yet issued at all.
6. Comments: Any comments about the executor.
7. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing an Executor

To edit an executor:

1. Click the [right-click icon](#) in the untitled column of the row representing the executor you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for executors, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Executor Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Executor

To delete an executor:

1. Click the [right-click icon](#) in the untitled column of the row representing the executor you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.

2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the executor, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Executor

To add a new executor:

1. Click the Add Executor button. This will bring up an Add/Edit panel for executors, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Executor Panel](#) for details about the fields.
3. Click Save to save the executor and close the panel.
 - If you decide you do not wish to save the executor, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Executor Panel

The Add/Edit Executor Panel allows you to fill in the details of an executor. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

1. Executor: The executor of the will.
2. [Type]: Whether the executor is the primary nominated executor, an alternative executor, or one of multiple co-executors.
3. Is Petitioner: Whether the executor is the petitioner in the petition for probate.
4. Relationship: The executor's relationship to the decedent.
5. Is Our Firm Representing: Whether your firm represents the executor in a contested petition for probate.
6. Letter of Testamentary: The status of the letter of testamentary, whether not yet issued, in the process of being issued to the executor, or already issued to the executor.
7. Comments: Any comments about the executor.

Witnesses Table

The Witnesses table is where the details of the witnesses to a decedent's will are stored. The Witnesses table is a subtable of the [Decedent Will Information Table](#), which means that each row of the Decedent Will Information table has an individual Witnesses table associated with it, which is specific to the decedent in that row; open a row of the Decedent Will Information table using the open/close icon to reveal the associated Witnesses table. Each row of the table represents an individual witness. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Witnesses table contains the following available columns:

| Witness for | Witness | Affidavit Requested | Affidavit Expected | Affidavit Received | Affidavit Filed | Comments | Right-click icon |
|-------------|--------------------|---------------------|--------------------|--------------------|-----------------|----------|------------------|
| Will | EMERSON, CLAUDE K. | 2/5/2018 | 2/5/2018 | 2/5/2018 | 4/2/2018 | | |
| Will | Stange, Eleanor | 2/5/2018 | 2/5/2018 | 4/5/2018 | 4/5/2018 | | |

1. Witness for: Whether the witness was a witness to the will or to a codicil.
2. Witness: The name of the witness.
3. Affidavit Requested: The date the witness's self-proving affidavit was requested by your firm.
4. Affidavit Expected: The date the witness's self-proving affidavit is expected to be received by your firm.
5. Affidavit Received: The date the witness's self-proving affidavit was received by your firm.
6. Affidavit Filed: The date the witness's self-proving affidavit was filed with the court.
7. Comments: Any comments about the witness.
8. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Witness

To edit a witness:

1. Click the [right-click icon](#) in the untitled column of the row representing the witness you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for witnesses, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Witness Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.

- If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Witness

To delete a witness:

1. Click the [right-click icon](#) in the untitled column of the row representing the witness you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the witness, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Witness

To add a new witness:

1. Click the Add Witness button. This will bring up an Add/Edit panel for witnesses, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Witness Panel](#) for details about the fields.
3. Click Save to save the witness and close the panel.
 - If you decide you do not wish to save the witness, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Witness Panel

The Add/Edit Witness Panel allows you to fill in the details of a witness. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Record' window for a witness. It contains the following fields:

- Witness for*:** Radio buttons for 'Will' (1) and 'Codicil'.
- Witness:** Text field containing 'SIMPSON, CLAUDE R., 621 Gr 2nd Ave Avenue, Chappaqua, NY 10511' (2).
- Affidavit Requested:** Date dropdown showing '3/5/2018' (3).
- Affidavit Expected:** Date dropdown showing '03/4/2018' (4).
- Affidavit Received:** Date dropdown showing '03/19/2018' (5).
- Affidavit Filed:** Date dropdown showing '04/02/2018' (6).
- Comments:** A large text area (7).

At the bottom, it shows 'Created at: 4/16/2018 3:33:00 PM by Dreier, Harry.' and 'Modified at: 4/17/2018 2:49:00 PM by Dreier, Harry.' with 'Save' and 'Cancel' buttons.

1. Witness for: Whether the witness was a witness to the will or to a codicil.
2. Witness: The name of the witness.
3. Affidavit Requested: The date the witness's self-proving affidavit was requested by your firm.
4. Affidavit Expected: The date the witness's self-proving affidavit is expected to be received by your firm.
5. Affidavit Received: The date the witness's self-proving affidavit was received by your firm.
6. Affidavit Filed: The date the witness's self-proving affidavit was filed with the court.
7. Comments: Any comments about the witness.

Distributees/Others

The Distributees/Others page allows you to view and record the details of the beneficiaries of deceased plaintiffs' wills or of their intestate estate.

The Structure of This Page

| Distributee | Relationship | Will % | Is Our Firm Representing | Waiver & Consent Required | Citation Required | Comments |
|-------------------------|-----------------------|--------|--------------------------|---------------------------|-------------------|----------|
| Single/Married Employee | Single/Married Spouse | 75.00% | Yes | No | No | |
| Single/Married Employee | Single/Married Child | 25.00% | Yes | No | No | |

1. Add Distributee button. Used to add a new beneficiary to the case file. See [Adding a Distributee](#).
2. Distributees table. Contains the beneficiary details and allows various actions to be performed on them. See [Distributees Table](#).

Distributees Table

The Distributees table is where the details of the distributees of a deceased plaintiff's estate are stored. Each row of the table represents an individual distributee. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Distributees table contains the following available columns:

| Decedent | Distributees/Beneficiaries/Others | Relationship | Will % | Is Our Firm Representing | Waiver & Consent Required | Citation Required | Guardian | GOP | GAL | Comments | |
|----------------------|-----------------------------------|--------------|--------|--------------------------|---------------------------|-------------------|--------------------|-----|-----|----------|--|
| Singhfonnes, Smaryne | Singhfonnes, S. A. | Sonnet | 25.00% | Yes | No | No | Singhfonnes, S. A. | No | No | | |
| Singhfonnes, Smaryne | Singhfonnes, Smaryne | Child | 25.00% | Yes | No | No | Singhfonnes, S. A. | No | Yes | | |

1. Decedent: The deceased plaintiff of whose estate the distributee is an heir.
2. Distributees/Beneficiaries/Others: The name of the distributees.
3. Relationship: The distributee's relationship to the decedent.
4. Will %: The percentage of the decedent's estate left to the distributee in the will.
5. Is Our Firm Representing: Whether your firm represents the distributee in estate litigation.
6. Waiver & Consent Required: Whether the distributee must sign a waiver and consent.
7. Citation Required: Whether the distributee must be served with a citation.
8. Guardian:
9. GOP:
10. GAL:
11. Comments: Any comments about the distributee.
12. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Additional columns are available for the Distributees table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Date Appointed [GAL], Date Appointed [GOP], Prop Guardian, Report Expected [GAL], Report Expected [GOP], Report Received [GAL], Report Received [GOP], Report Requested [GAL], Report Requested [GOP].

Editing a Distributee

To edit a distributee:

1. Click the [right-click icon](#) in the untitled column of the row representing the distributee you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for distributees, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Distributee Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Distributee

To delete a distributee:

1. Click the [right-click icon](#) in the untitled column of the row representing the distributee you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the distributee, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Distributee

To add a new distributee:

1. Click the Add Distributee button. This will bring up an Add/Edit panel for distributees, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Distributee Panel](#) for details about the fields.
3. Click Save to save the distributee and close the panel.
 - If you decide you do not wish to save the distributee, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Distributee Panel

The Add/Edit Distributee Panel allows you to fill in the details of a distributee. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Decedent: The deceased plaintiff of whose estate the distributee is an heir.
2. Distributees/Beneficiaries/Others: The name of the distributee.
3. Relationship: The distributee's relationship to the decedent.
4. Will: The percentage of the decedent's estate left to the distributee in the will.
5. Is Our Firm Representing: Whether your firm represents the distributee in estate litigation.
6. Waiver & Consent Required: Whether the distributee must sign a waiver and consent.
7. Citation Required: Whether the distributee must be served with a citation or not.
8. GAL: Whether a guardian ad litem has been appointed for the distributee.
9. Guardian: The guardian ad litem appointed for the distributee. This field is uneditable unless GAL is selected.
10. Date Appointed [GAL]: The date the guardian ad litem was appointed for the distributee. This field is uneditable unless GAL is selected.
11. Report Requested [GAL]: The date the report of the guardian ad litem was requested by your firm. This field is uneditable unless GAL is selected.
12. Report Expected [GAL]: The date the report of the guardian ad litem is expected to be received by your firm. This field is uneditable unless GAL is selected.
13. Report Received [GAL]: The date the report of the guardian ad litem was received by your firm. This field is uneditable unless GAL is selected.
14. GOP: Whether a guardian of the property has been appointed for the distributee.
15. Prop Guardian: The guardian of the property appointed for the distributee. This field is uneditable unless GOP is selected.
16. Date Appointed [GOP]: The date the guardian of the property was appointed for the distributee. This field is uneditable unless GOP is selected.
17. Report Requested [GOP]: The date the report of the guardian of the property was requested by your firm. This field is uneditable unless GOP is selected.
18. Report Expected [GOP]: The date the report of the guardian of the property is expected to be received by your firm. This field is uneditable unless GOP is selected.
19. Report Received [GOP]: The date the report of the guardian of the property was received by your firm. This field is uneditable unless GOP is selected.
20. Comments: Any comments about the distributee.

Letter of Administration

The Letter of Administration page allows you to view and record the details of the process of getting a letter of administration or testamentary issued. Note that the details of the petitioner/executor personally are not recorded on this page; they are recorded in the [Executors Table](#) in the [Will Information](#) page.

The Structure of This Page

| Decedent | Petition Filed | Court | Courtroom Clerk | Law Secretary | Docket/Order # | Judge | Letters Issued | Order Signed |
|---------------------|----------------|------------------------------|-------------------|---------------|----------------|---------------|----------------|--------------|
| Giuglielmo, Emeryna | 3/12/2018 | Saratoga Court, Kings County | Scataris, Juliana | Ther, Teresa | 18-12345 | Wesley Lee I. | 3/26/2018 | 4/3/2018 |

1. Add Letter of Administration/Testamentary button. Used to add a new petition for a letter of administration or testamentary to the case file. See [Add a Petition for a Letter of Administration or Testamentary](#).
2. Letter of Administration/Testamentary table. Contains the petition process details and allows various actions to be performed on them. See [Letter of Administration/Testamentary Table](#).

Letter of Administration/Testamentary Table

The Letter of Administration/Testamentary table is where the details of the process of getting a letter of administration or testamentary issued are stored. Each row of the table represents an individual petition. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Letter of Administration/Testamentary table contains the following available columns:

| Decedent | Petition Filed | Court | Courtroom Clerk | Law Secretary | Docket/Order # | Judge | Letters Issued | Order Signed |
|---------------------|----------------|------------------------------|-----------------|-------------------|----------------|----------|----------------|--------------|
| Giuglielmo, Emeryna | 3/12/2018 | Saratoga Court, Kings County | Glassen, Leo I. | Scataris, Juliana | Ther, Teresa | 18-12345 | 3/26/2018 | 4/3/2018 |

1. Decedent: The deceased plaintiff whose estate is at issue in the petition.
2. Petition Filed: The date the petition was filed with the court.
3. Court: The court overseeing the proceedings for the decedent's estate.
4. Judge: The judge overseeing the proceedings for the decedent's estate.
5. Courtroom Clerk: The courtroom clerk assisting the judge in the estate proceedings.
6. Law Secretary: The law secretary assisting the judge in the estate proceedings.
7. Docket/Index #: The docket or index number of the case associated with the decedent's estate.
8. Letters Issued: The date the letter of administration or testamentary was issued.
9. Order Signed: The date the order authorizing the letter of administration or testamentary was signed.
10. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Petition for a Letter of Administration or Testamentary

To edit a petition for a letter of administration or testamentary:

1. Click the [right-click icon](#) in the untitled column of the row representing the petition you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for petitions, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Letter of Administration/Testamentary Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Petition for a Letter of Administration or Testamentary

To delete a petition for a letter of administration or testamentary:

1. Click the [right-click icon](#) in the untitled column of the row representing the petition you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the petition, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Petition for a Letter of Administration or Testamentary

To add a new petition for a letter of administration or testamentary:

1. Click the Add Letter of Administration/Testamentary button. This will bring up an Add/Edit panel for petitions, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Letter of Administration/Testamentary Panel](#) for details about the fields.
3. Click Save to save the petition and close the panel.
 - If you decide you do not wish to save the petition, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Letter of Administration/Testamentary Panel

The Add/Edit Letter of Administration/Testamentary Panel allows you to fill in the details of a petition for a letter of administration or testamentary. See [Add/Edit Panels for general information about panel structure and usage](#). This panel contains the following fields:

Created at 4/18/2018 7:53:00 AM by Dreier, Harry.
Modified at 4/18/2018 8:12:00 AM by Dreier, Harry.

1. Decedent: The deceased plaintiff whose estate is at issue in the petition.
2. Petition Filed: The date the petition was filed with the court.
3. Court: The court overseeing the proceedings for the decedent's estate.
4. Docket/Index #: The docket or index number of the case associated with the decedent's estate.
5. Judge: The judge overseeing the proceedings for the decedent's estate.
6. Law Secretary: The law secretary assisting the judge in the estate proceedings.
7. Courtroom Clerk: The courtroom clerk assisting the judge in the estate proceedings.
8. Letters Issued: The date the letter of administration or testamentary was issued.
9. Order Signed: The date the order authorizing the letter of administration or testamentary was signed.

The Death Compromise page allows you to view and record the details of wrongful death compromises. Note that the details of the distribution of funds comprising the compromise are not recorded on this page; they are recorded in the [Death Compromise Distribution \[Settlement\] Table](#) in the [Death Compromise Distribution](#) page.

The Structure of This Page

Note: The Add Waivers & Consents button, Waivers & Consents table, Add Citation button, and Citations table are all associated with an individual row of the Death Compromise table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Death Compromise page, and where in the Death Compromise table they appear, will depend on which row, if any, of the Death Compromise table is set to display subtables. See [Subtables and the Open/Closed Column](#).

The screenshot displays three subtables. The top table, 'Death Compromise', has columns: Decedent, Decision Rendered, Affidavit Service Filed, Decision Received, Settlement Date, Decision Date, Decree Received, Settled Decree Served, and Decree Date. The middle table, 'Waivers & Consents', has columns: Distributee, Sent Date, Expected Date, Received Date, and Filed in Court. The bottom table, 'Citations', has columns: Sent to Court, Last Date to Serve, Expected Date, Serve Date, Received Date, Affidavit of Service Filed, Return Date, Affidavit of Service Received, and Jurisdiction Completed. Red circles 1-6 highlight: 1. 'Add Death Compromise' button; 2. 'Decision Received' date; 3. 'Add Waivers & Consents' button; 4. 'Expected Date' in Waivers & Consents; 5. 'Add Citation' button; 6. 'Received Date' in Citations.

1. Add Death Compromise button. Used to add a new wrongful death compromise to the case file. See [Adding a Wrongful Death Compromise](#).
2. Death Compromise table. Contains the wrongful death compromise details and allows various actions to be performed on them. See [Death Compromise Table](#).
3. Add Waivers & Consents button. Used to add a new waiver and consent to the case file. See [Adding a Waiver and Consent](#).
4. Waivers & Consents table. Contains the details of waivers and consents for a particular compromise and allows various actions to be performed on them. See [Waivers & Consents Table](#).
5. Add Citation button. Used to add a new citation to the case file. See [Adding a Citation](#).
6. Citations table. Contains the citation details for a particular compromise and allows various actions to be performed on them. See [Citations Table](#).

Death Compromise Table

The Death Compromise table is where the details of wrongful death compromises are stored. Each row of the table represents an individual compromise. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Death Compromise table contains the following available columns:

The screenshot shows the main table with columns numbered 1-10: 1. [column with no title] (plus sign icon), 2. Decedent, 3. Decision Rendered, 4. Affidavit Service Filed, 5. Decision Received, 6. Settlement Date, 7. Decision Date, 8. Decree Received, 9. Settled Decree Served, 10. Decree Date.

1. [column with no title]: A plus sign **+** in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Waivers & Consents and Citations for that Death Compromise). Clicking on the plus sign opens the Waivers & Consents and Citations subtables for that Death Compromise. The plus sign then turns into a negative sign **-** which, when clicked, closes the subtable.
2. Decedent: The deceased plaintiff whose wrongful death case is being settled.
3. Decision Rendered: The date the court hearing the wrongful death case rendered a decision on the proposed settlement.
4. Affidavit Service Filed: The date the affidavit of services was filed.
5. Decision Received: The date your firm received the decision by the court hearing the wrongful death case on the proposed settlement.
6. Settlement Date: The date the decree is to be settled.
7. Decision Date: The date the decision on the proposed settlement was entered.
8. Decree Received: The date the settled decree was received by your firm.
9. Settled Decree Served: The date the settled decree was served on the distributees.
10. Decree Date: The date the settled decree was signed.
11. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete

Editing a Wrongful Death Compromise

To edit a wrongful death compromise:

1. Click the [right-click icon](#) in the untitled column of the row representing the compromise you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for wrongful death compromises, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Death Compromise Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Wrongful Death Compromise

To delete a wrongful death compromise:

1. Click the [right-click icon](#) in the untitled column of the row representing the compromise you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the compromise, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Wrongful Death Compromise

To add a new wrongful death compromise:

1. Click the Add Death Compromise button. This will bring up an Add/Edit panel for wrongful death compromises, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Death Compromise Panel](#) for details about the fields.
3. Click Save to save the compromise and close the panel.
 - If you decide you do not wish to save the compromise, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Death Compromise Panel

The Add/Edit Death Compromise Panel allows you to fill in the details of a wrongful death compromise. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Decedent: The deceased plaintiff whose estate is at issue in the petition.
2. Decision Rendered: The date the court hearing the wrongful death case rendered a decision on the proposed settlement.
3. Affidavit Service Filed: The date the affidavit of service was filed.
4. Decision Received: The date your firm received the decision by the court hearing the wrongful death case on the proposed settlement.
5. Settlement Date: The date the decree is to be settled.
6. Decision Date: The date the decision on the proposed settlement was entered.
7. Decree Received: The date the settled decree was received by your firm.
8. Settled Decree Served: The date the settled decree was served on the distributees.
9. Decree Date: The date the settled decree was signed.

Waivers & Consents Table

The Waivers & Consents table is where the details of waivers and consents are stored. The Waivers & Consents table is a subtable of the [Death Compromise Table](#), which means that each row of the Death Compromise table has an individual Waivers & Consents table associated with it, which is specific to the compromise in that row; open a row of the Death Compromise table using the open/close icon to reveal the associated Waivers & Consents table. Each row of the table represents an individual waiver and consent. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Waivers & Consents table contains the following available columns:

1. Distributee: The distributee who was sent a waiver and consent.
2. Sent Date: The date the waiver and consent was sent to the distributee.
3. Expected Date: The date the signed waiver and consent is expected to be received by your firm.
4. Received Date: The date the signed waiver and consent was received by your firm.
5. Filed in Court: The date the signed waiver and consent was filed with the court.
6. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Waiver and Consent

To edit a waiver and consent:

1. Click the [right-click icon](#) in the untitled column of the row representing the waiver and consent you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for waivers and consents, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Waiver & Consent Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Waiver and Consent

To delete a waiver and consent:

1. Click the [right-click icon](#) in the untitled column of the row representing the waiver and consent you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the waiver and consent, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

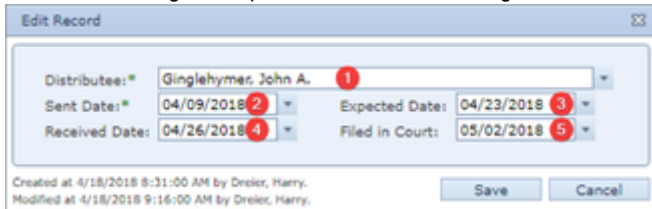
Adding a Waiver and Consent

To add a new waiver and consent:

1. Click the Add Waivers & Consents button. This will bring up an Add/Edit panel for waivers and consents, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Waiver & Consent Panel](#) for details about the fields.
3. Click Save to save the waiver and consent and close the panel.
 - If you decide you do not wish to save the waiver and consent, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Waiver & Consent Panel

The Add/Edit Waiver & Consent Panel allows you to fill in the details of a waiver and consent. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



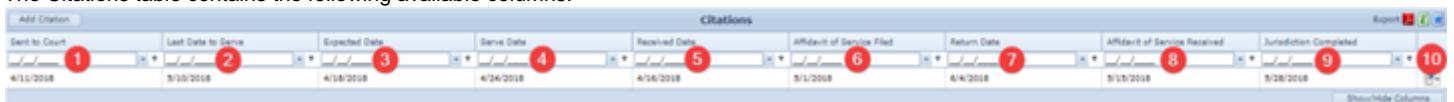
1. Distributee: The distributee who was sent a waiver and consent.
2. Sent Date: The date the waiver and consent was sent to the distributee.
3. Expected Date: The date the signed waiver and consent is expected to be received by your firm.
4. Received Date: The date the signed waiver and consent was received by your firm.
5. Filed in Court: The date the signed waiver and consent was filed with the court.

Citations Table

The Citations table is where the details of citations are stored. The Citations table is a subtable of the [Death Compromise Table](#), which means that each row of the Death Compromise table has an individual Citations table associated with it, which is specific to the compromise in that row; open a row of the Death Compromise table using the open/close icon to reveal the associated Citations table. Each row of the table represents an individual citation. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Citations table contains the following available columns:



1. Sent to Court: The date the citation was sent to the court to be signed.
2. Last Date to Serve: The deadline to serve the citation.
3. Expected Date: The date the signed citation is expected from the court.
4. Serve Date: The date the citation was served.
5. Received Date: The date the signed citation was received from the court.
6. Affidavit of Service Filed: The date the affidavit of service was filed with the court.
7. Return Date: The return date of the citation.
8. Affidavit of Service Received: The date the affidavit of service was received from the process server.
9. Jurisdiction Completed: The date that jurisdiction was established over all distributees.
10. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Citation

To edit a citation:

1. Click the [right-click icon](#) in the untitled column of the row representing the citation you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for citations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Citation Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Citation

To delete a citation:

1. Click the [right-click icon](#) in the untitled column of the row representing the citation you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the citation, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Citation

To add a new citation:

1. Click the Add Citation button. This will bring up an Add/Edit panel for citations, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Citation Panel](#) for details about the fields.
3. Click Save to save the citation and close the panel.
 - If you decide you do not wish to save the citation, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Citation Panel

The Add/Edit Citation Panel allows you to fill in the details of a citation. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Edit Record

Sent to Court:* 04/11/2018 1 Last Date to Serve: 05/10/2018 2

Expected Date: 04/18/2018 3 Serve Date: 04/24/2018 4

Received Date: 04/16/2018 5 Affidavit of Service Filed: 05/01/2018 6

Return Date: 06/04/2018 7 Affidavit of Service Received: 05/15/2018 8

Jurisdiction Completed: 05/28/2018 9

Created at 4/18/2018 8:33:00 AM by Dreier, Harry.
Modified at 4/18/2018 10:37:00 AM by Dreier, Harry.

Save Cancel

1. Sent to Court: The date the citation was sent to the court to be signed.
2. Last Date to Serve: The deadline to serve the citation.
3. Expected Date: The date the signed citation is expected from the court.
4. Serve Date: The date the citation was served.
5. Received Date: The date the signed citation was received from the court.
6. Affidavit of Service Filed: The date the affidavit of service was filed with the court.
7. Return Date: The return date of the citation.
8. Affidavit of Service Received: The date the affidavit of service was received from the process server.
9. Jurisdiction Completed: The date that jurisdiction was established over all distributees.

Death Compromise Distribution

The Death Compromise Distribution page allows you to view and record the details of the distribution of money in a wrongful death compromise.

The Structure of This Page

Note: The Add Distribution button and Death Compromise Distribution [Beneficiaries] table are both associated with an individual row of the Adverse Exams table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your Adverse Exams page, and where in the Adverse Exams table they appear, will depend on which row, if any, of the Adverse Exams table is set to display subtables. See [Subtables and the Open/Closed Column](#).

Death Compromise Distribution

| Decedent | Death Compromise Submitted | Wrongful Death | Consensus Pain & Suffering | Offer Letter Received |
|--------------------|----------------------------|----------------|----------------------------|-----------------------|
| Singlehorns, Emrys | 3/30/2018 | Yes 1 | Yes | Yes |

Death Compromise Distribution

| Decision Rendered | Wrongful Death | Attorney Fees | Pain & Suffering | Misc. Fees | Structured | GDP Fees | Other Debts / Taxes |
|----------------------|----------------|---------------|------------------|-------------|------------|----------|---------------------|
| Singlehorns, John A. | \$120,000.00 | \$80,000.00 | \$80,000.00 3 | \$80,000.00 | No | | |

10. Death Compromise Distribution [Settlement] table. Contains basic details about the settlement associated with the compromise and allows the details to be edited. See [Death Compromise Distribution \[Settlement\] Table](#).

11. Add Distribution button. Used to add the distribution of money to a beneficiary to the case file. See [Adding a Wrongful Death Compromise Beneficiary](#).
12. Death Compromise Distribution [Beneficiaries] table. Contains the details of the distribution of money to beneficiaries and allows various actions to be performed on them. See [Death Compromise Distribution \[Beneficiaries\] Table](#).

Death Compromise Distribution [Settlement] Table

The Death Compromise Distribution [Settlement] table is where the basic details of the settlement associated with a wrongful death compromise are stored. Each row of the table represents an individual decedent. It is not possible to directly add or delete a row from this table; there is automatically a row in this table for each row representing a decedent in the [Decedent Information Table](#) on the [Decedent Information](#) case page. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Death Compromise Distribution [Settlement] table contains the following available columns:

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|----------------------|----------------------------|----------------|----------------------------|-----------------------|---|---|
| Decedent | Death Compromise Submitted | Wrongful Death | Conscious Pain & Suffering | Offer Letter Received | | |
| Ginglehimer, Smeryna | 3/13/2018 | Yes | Yes | Yes | | |

1. [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Death Compromise Distribution [Beneficiaries] for that Death Compromise Distribution [Settlement]). Clicking on the plus sign opens the Death Compromise Distribution [Settlement] subtable for that service provider. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
2. Decedent: The deceased plaintiff.
3. Death Compromise Submitted: The date the proposed distribution was submitted to the court.
4. Wrongful Death: Whether the settlement includes a portion attributed to the wrongful death of the decedent.
5. Conscious Pain & Suffering: Whether the settlement includes a portion attributed to the conscious pain and suffering of the decedent.
6. Offer Letter Received: Whether your firm has received the offer letter containing the proposed settlement.
7. [column with no title]: [Right-click icon](#); right-click menu contains Edit.

Editing a Wrongful Death Compromise Settlement

To edit a wrongful death compromise settlement:

1. Click the [right-click icon](#) in the untitled column of the row representing the settlement you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for wrongful death compromise settlements, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Death Compromise Details Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Death Compromise Details Panel

The Add/Edit Death Compromise Details Panel allows you to fill in the details of the settlement associated with a wrongful death compromise. See [Add/Edit Panels](#) for general information about panel structure and usage. This panel contains the following fields:

Decedent: 1
 Death Compromise Submitted: 2
 Wrongful Death: 3 Conscious Pain & Suffering: 4
 Offer Letter Received: 5

Created at 8/21/2017 12:33:00 PM by Simpson, Claude, Esq.
 Modified at 7/13/2018 1:03:00 PM by Dreier, Harry.

Save Cancel

1. Decedent: The deceased plaintiff.
2. Death Compromise Submitted: The date the proposed distribution was submitted to the court.
3. Wrongful Death: Whether the settlement includes a portion attributed to the wrongful death of the decedent.
4. Conscious Pain & Suffering: Whether the settlement includes a portion attributed to the conscious pain and suffering of the decedent.
5. Offer Letter Received: Whether your firm has received the offer letter containing the proposed settlement.

Death Compromise Distribution [Beneficiaries] Table

The Death Compromise Distribution [Beneficiaries] table is where the details of the distribution of money to beneficiaries or others who are owed portions of the settlement are stored. The Death Compromise Distribution [Beneficiaries] table is a subtable of the [Death Compromise Distribution \[Settlement\] Table](#), which means that each row of the Death Compromise Distribution [Settlement] table has an individual Death Compromise Distribution [Beneficiaries] table associated with it, which is specific to the decedent in that row; open a row of the Death Compromise Distribution [Settlement] table using the open/close icon to reveal the associated Death Compromise Distribution [Beneficiaries] table. Each row of the table represents an individual beneficiary. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Death Compromise Distribution [Beneficiaries] table contains the following available columns:

| Decision Rendered | Wrongful Death | Attorney Fees | Pain & Suffering | GAL Fees | Structured | GOP Fees | Other Debts / Taxes | |
|----------------------|----------------|---------------|------------------|-------------|------------|----------|---------------------|--|
| Ginglehymen, John A. | \$150,000.00 | \$80,000.00 | \$90,000.00 | \$90,000.00 | No | | | |

1. Decision Rendered: The name of the beneficiary.
2. Wrongful Death: The amount distributed to the beneficiary from the portion of the settlement attributed to wrongful death.
3. Attorney Fees: The amount distributed to the attorney in fees from the settlement.
4. Pain & Suffering: The amount distributed to the beneficiary from the portion of the settlement attributed to conscious pain and suffering.
5. GAL Fees: The amount distributed to the guardian ad litem in fees from the settlement.
6. Structured: Whether the distribution of money to the defendant is in a structured form.
7. GOP Fees: The amount distributed to the guardian of the property in fees from the settlement.
8. Other Debts/Taxes: The amount distributed to the contact from the settlement for any other reason.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Wrongful Death Compromise Beneficiary

To edit a wrongful death compromise beneficiary:

1. Click the [right-click icon](#) in the untitled column of the row representing the beneficiary you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for wrongful death compromise beneficiaries, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Distribution Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Wrongful Death Compromise Beneficiary

To delete a wrongful death compromise beneficiary:

1. Click the [right-click icon](#) in the untitled column of the row representing the beneficiary you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the beneficiary, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Wrongful Death Compromise Beneficiary

To add a new wrongful death compromise beneficiary:

1. Click the Add Distribution button. This will bring up an Add/Edit panel for wrongful death compromise beneficiaries, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Distribution Panel](#) for details about the fields.
3. Click Save to save the beneficiary and close the panel.
 - If you decide you do not wish to save the beneficiary, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Distribution Panel

The Add/Edit Distribution Panel allows you to fill in the details of the distribution of money to beneficiaries or others who are owed portions of the settlement. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

Created at 4/18/2018 10:43:00 AM by Dreier, Harry.
Modified at 4/18/2018 1:36:00 PM by Dreier, Harry.

Save Cancel

1. Decision Rendered: The name of the beneficiary.
2. Wrongful Death: The amount distributed to the beneficiary from the portion of the settlement attributed to wrongful death.
3. Attorney Fees: The amount distributed to the attorney in fees from the settlement.
4. Pain & Suffering: The amount distributed to the beneficiary from the portion of the settlement attributed to conscious pain and suffering.
5. GAL Fees: The amount distributed to the guardian ad litem in fees from the settlement.
6. Structured: Whether the distribution of money to the defendant is in a structured form.
7. GOP Fees: The amount distributed to the guardian of the property in fees from the settlement.
8. Other Debts/Taxes: The amount distributed to the contact from the settlement for any other reason.

Will Information

This page is currently under construction. Check back for updates!

Decedent Information

This page is currently under construction. Check back for updates!

Distributees/Others

This page is currently under construction. Check back for updates!

Letter of Administration

This page is currently under construction. Check back for updates!

Death Compromise

The Death Compromise screen allows you to view and record the details of an agreement for death compromise in a wrongful death case.

The Structure of This Page

| ADD DEATH COMPROMISE | | | | | | | | | | Death Compromise | | Export | | | | | | | |
|----------------------|---------------|-------------------|----------|-------------------------|----------|-------------------|----------|-----------------|----------|------------------|----------|-----------------|----------|----------------------|----------|-------------|---|--------|----|
| Decedent | 1 | Decision Rendered | 2 | Affidavit Service Filed | 3 | Decision Received | 4 | Settlement Date | 5 | Decision Date | 6 | Decree Received | 7 | Settled Decree Serve | 8 | Decree Date | 9 | Action | 10 |
| > | Swanson, Todd | 4/5/2023 | 4/6/2023 | 4/6/2023 | 4/6/2023 | 4/5/2023 | 4/6/2023 | 4/5/2023 | 4/6/2023 | 4/5/2023 | 4/6/2023 | 4/5/2023 | 4/6/2023 | 4/5/2023 | 4/6/2023 | | | | |

1. Decedent's Name
2. Date death compromise decision rendered
3. Date affidavit of service filed
4. Date death compromise decision received
5. Date of settlement
6. Date of decision
7. Date decree is received
8. Date settled decree is served
9. Date of Decree
10. Action Icon

Adding a Death Compromise

Edit Record

Decedent:*

Decision Rendered:* Decision Received:

Decision Date: Settled Decree Served:

Affidavit Service Filed: Settlement Date:

Decree Received: Decree Date:

Clicking the Add Death Compromise button allows entry of the following information regarding the death compromise:

1. Decedent's Name
2. Date death compromise decision rendered
3. Date decision is received
4. Date of decision
5. Date settled decree is served
6. Date affidavit of service is filed
7. Date of settlement
8. Date decree is received

9. Date of Decree

Waivers, Consents and Citations

Once a death compromise has been added to the screen, additional sub-tables allow the entry of waivers, consents and citations.

Clicking the Add Waivers & Consents button allows entry of the following information:

Edit Record

| | | | |
|----------------|---|-----------------|---|
| Distributee:* | <input type="text" value="1"/> | | |
| Sent Date:* | <input type="text" value="__/__/__ 2"/> | Expected Date: | <input type="text" value="__/__/__ 3"/> |
| Received Date: | <input type="text" value="__/__/__ 4"/> | Filed in Court: | <input type="text" value="__/__/__ 5"/> |

1. Distributee's Name
2. Date waiver/consent was sent
3. Date waiver/consent is expected
4. Date waiver/consent was received
5. Date waiver/consent was filed in court

Clicking the Add Citation button allows entry of the following information:

Edit Record

| | | | |
|-------------------------|---|--------------------------------|---|
| Sent to Court:* | <input type="text" value="__/__/__ 1"/> | Last Date to Serve: | <input type="text" value="__/__/__ 2"/> |
| Expected Date: | <input type="text" value="__/__/__ 3"/> | Serve Date: | <input type="text" value="__/__/__ 4"/> |
| Received Date: | <input type="text" value="__/__/__ 5"/> | Affidavit of Service Filed: | <input type="text" value="__/__/__ 6"/> |
| Return Date: | <input type="text" value="__/__/__ 7"/> | Affidavit of Service Received: | <input type="text" value="__/__/__ 8"/> |
| Jurisdiction Completed: | <input type="text" value="__/__/__ 9"/> | | |

1. Date citation was sent to court
2. Last date to serve the citation
3. Date citation is expected
4. Date citation was served
5. Date citation was received
6. Date the affidavit of service was filed
7. Return date
8. Date affidavit of service was received
9. Date jurisdiction was completed

Death Compromise Distribution

This page is currently under construction. Check back for updates!

Other

Other Cases

The Other Cases page contains a listing of all other cases in SmartAdvocate that share at least one plaintiff with this case. If there are no such cases, the page will simply read, "no data to display." Otherwise, the page contains a single text table, in which each row represents a plaintiff in a case that shares a plaintiff with this case. If some case contains a plaintiff that is in this case and one that is not, both plaintiffs will be represented by individual rows in this table. The table contains the following columns:

1. Case Name: The name of the case.
2. Plaintiff: The name of the plaintiff.
3. Case #: The case number.
4. Case Type: The case type of the case.
5. Status: The primary status of the case.
6. Case Manager: The case manager on the case, if any.

| Case Name | Plaintiff | Case # | Case Type | Status | Case Manager |
|----------------------------------|-----------------|---------|---------------|--|--------------|
| Simpson, Claude → Besnick, Barry | Simpson, Claude | 0115330 | Auto Accident | Pre-UT 01 - RI New Case - Initial Letters to Be Sent | |
| Simpson, Claude → Adrin, A. | Simpson, Claude | 6000004 | Auto Accident | UT 2 - Summons & Complaint To Be Prepared | |
| Simpson, Claude → Dea, John | Simpson, Claude | 6000015 | Auto Accident | Closed Case | |

Bankruptcy

The Bankruptcy page allows you to view and record the details of plaintiffs' or defendants' bankruptcies.

The Structure of This Page

| Party Name | Bankruptcy Type | Court | Judge | Docket No. | Trustee | Retained by Trustee | Attorney | Proof of Claim Filed | Date of Discharge |
|------------------|-----------------|--|-----------------|------------|----------------------|---------------------|--------------|----------------------|-------------------|
| Simpson, Annette | Chapter 7 | Bankruptcy Court of Eastern District of New York | Campbell, David | 6059257 | Aut Settlement Trust | 1/23/2018 | Coak, Joseph | 3/5/2018 | 11/24/2017 |

1. Add Bankruptcy button. Used to add a new bankruptcy to the case file. See [Adding a Bankruptcy](#).
2. Bankruptcy table. Contains the bankruptcy details and allows various actions to be performed on them. See [Bankruptcy Table](#).

Bankruptcy Table

The Bankruptcy table is where the details of bankruptcies are stored. Each row of the table represents an individual bankruptcy. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Bankruptcy table contains the following available columns:

| Party Name | Bankruptcy Type | Party Type | Filing Date | Claim No. | Court | Judge | Docket No. | Trustee | Letter to Trustee on Case | Retained by Trustee | Attorney | Proof of Claim Filed | Date of Discharge | Release to Trustee | Comments |
|------------------|-----------------|------------|-------------|-----------|--|-----------------|------------|----------------------|---------------------------|---------------------|--------------|----------------------|-------------------|--------------------|----------|
| Simpson, Annette | Chapter 7 | Defendant | 11/9/2017 | 6059257 | Bankruptcy Court of Eastern District of New York | Campbell, David | 6059257 | Aut Settlement Trust | 1/8/2018 | 1/23/2018 | Coak, Joseph | 3/5/2018 | 11/24/2017 | 3/15/2018 | |

1. Party Name: The party that filed for bankruptcy.
2. Bankruptcy Type: The chapter of the Bankruptcy Code under which the bankruptcy was filed.
3. Party Type: Whether the bankruptcy party is a defendant or plaintiff in the case.
4. Filing Date: The date the party filed for bankruptcy.
5. Claim No: The identification number of the claim filed on behalf of your client against the bankrupt defendant.
6. Court: The court overseeing the bankruptcy proceeding.
7. Judge: The judge overseeing the bankruptcy proceeding.
8. Docket No: The docket number of the bankruptcy proceeding.
9. Trustee: The trustee in the bankruptcy.
10. Letter to Trustee on Case: The date your firm sent an introductory letter to the trustee regarding the case.
11. Retained by Trustee: The date your firm was retained by the trustee who assumed the plaintiff's interest in the lawsuit.
12. Attorney: The bankruptcy attorney retained by the party.
13. Proof of Claim Filed: The date a proof of claim was filed on behalf of your client against the bankrupt defendant.
14. Date of Discharge: The date the bankruptcy discharge was entered.
15. Release to Trustee: The date the settlement and release agreement was sent to the trustee.
16. Comments: Any comments about the bankruptcy.
17. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing a Bankruptcy

To edit a bankruptcy:

1. Click the [right-click icon](#) in the untitled column of the row representing the bankruptcy you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for bankruptcies, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Bankruptcy Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Bankruptcy

To delete a bankruptcy:

1. Click the [right-click icon](#) in the untitled column of the row representing the bankruptcy you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the bankruptcy, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Bankruptcy

To add a new bankruptcy:

1. Click the Add Bankruptcy button. This will bring up an Add/Edit panel for bankruptcies, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Bankruptcy Panel](#) for details about the fields.
3. Click Save to save the bankruptcy and close the panel.
 - If you decide you do not wish to save the bankruptcy, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Bankruptcy Panel

The Add/Edit Bankruptcy Panel allows you to fill in the details of a bankruptcy. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:



1. Party Name: The party that filed for bankruptcy.
2. Bankruptcy Type: The chapter of the Bankruptcy Code under which the bankruptcy was filed.
3. Filing Date: The date the party filed for bankruptcy.
4. Court: The court overseeing the bankruptcy proceeding.
5. Judge: The judge overseeing the bankruptcy proceeding.
6. Docket No: The docket number of the bankruptcy proceeding.
7. Trustee: The trustee in the bankruptcy.
8. Letter to Trustee on Case: The date your firm sent an introductory letter to the trustee regarding the case.
9. Retained by Trustee: The date your firm was retained by the trustee who assumed the plaintiff's interest in the lawsuit.
10. Release to Trustee: The date the settlement and release agreement was sent to the trustee.
11. Attorney: The bankruptcy attorney retained by the party.
12. Proof of Claim Filed: The date a proof of claim was filed on behalf of your client against the bankrupt defendant.
13. Claim No: The identification number of the claim filed on behalf of your client against the bankrupt defendant.
14. [Trustee Action]: Whether there was a payment of proceeds and fees by or to the trustee or the trustee waived any interest in the case.
15. Payments of Proceeds and Fees by/to Trustee: The date that proceeds and fees from the case were paid by or to the trustee. This field does not appear unless Payments of Proceeds and Fees by/to Trustee is selected in [Trustee Action].
16. Date of Discharge: The date the bankruptcy discharge was entered.
17. Comments: Any comments about the bankruptcy.

All Contacts

The All Contacts page contains a list of every contact associated with the case, along with their role in the case, contact information, and where in the SmartAdvocate system that contact was entered into the case. This list is populated automatically as contacts are added as information on the other case pages on the case; however, you can also add a contact directly on this page. This is useful if they are connected to the case, or it is important to have their contact information quickly accessible, but their significance to the case is not captured by any of the other case pages.

| ADD NEW CONTACT 1 | | | | | | | All Contacts | |
|-----------------------|--------------|-------|----------------|----------|----------------|--|--------------|--|
| Name | Role | Email | Contact Number | Employer | Screen Entered | | | |
| Bunker, Archibald | (D)-Operator | | | | | | Defendant | |
| Huxtable, Healthcliff | (P)-Operator | | | | | | Plaintiff | |

1. Add New Contact button. Used to add a new contact to the case file. See [Adding a Case Contact](#).
2. Contacts table. Contains the details of case contacts and allows various actions to be performed on them. See [Contacts Table](#).

Contacts Table

The Contacts table is where the list of contacts related to the case is stored. Each row of the table represents an individual contact. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Contacts table contains the following available columns:

| ADD NEW CONTACT | | | | | | | | All Contacts | | Export |
|-------------------------|--------------------|-------------------------------|----------------|-------------------------------|----------|----------|--------|--------------|--|--------|
| Name | Role | Email | Contact Number | Screen Entered | Employer | Comments | Action | | | |
| A.O. Fox Hospital | Medical Provider | | (607) 431-9980 | Plaintiff - Medical Providers | | | | | | |
| Bandiera, Jasmine, R.N. | Expert | jasmine@fscareerresources.com | (861) 323-4867 | Litigation - Expert | | | | | | |
| Bliss, Natalie | Case Manager | nataliab@smartafo-ccare.com | (831) 311-1111 | Case Summary - Staff | | | | | | |
| Cablevision | Paid Advertisement | cc@ca.nj | | General - Retainer/Referral | | | | | | |

1. Name: The name of the contact (Lastname, Firstname format for individuals).
2. Role: The contact's role or roles in the case.
3. Email: The primary email address of the contact.
4. Contact Number: The primary phone number of the contact.
5. Screen Entered: The case page or pages in which the contact was selected.
6. Employer: The employer of the contact.
7. Comment: Any comments about the contact's involvement in the case.
8. Action: Edit icon, Delete icon. The Delete icon only appears if the contact was added using the Add New Contact button on this page.

Editing a Case Contact

To edit a case contact:

1. Click the [Edit icon](#) in the Action column of the row representing the contact you wish to edit. This will bring up an Add/Edit panel for case contacts, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Case Contact Panel](#) for details about the fields.
3. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting a Case Contact

To delete a case contact from the case:

1. Click the [Delete icon](#) in the Action column of the row representing the contact you wish to delete from the case. This will bring up a confirmation message (to avoid accidental deletions).
 - You can only delete contacts that were added from this page. Contacts that were added on other pages cannot be deleted directly from the All Contacts page; you must separately delete whatever record on another page contains the contact.
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the contact from the case, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding a Case Contact

To add a new case contact:

1. Click the Add New Contact button. This will bring up an Add/Edit panel for case contacts, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Case Contact Panel](#) for details about the fields.
3. Click Save to save the case contact and close the panel.
 - If you decide you do not wish to save the case contact, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Case Contact Panel

The Add/Edit Case Contact Panel allows you to fill in the details of a contact's connection to the case. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Contact: The name of the contact. When editing an existing case contact, this field is uneditable.
2. Role: The contact's role in the case. This field is uneditable unless the case contact was added using the Add New Contact button on this page.
3. Comment: Any comments about the contact's involvement in the case.

All Insurance

The All Insurance page contains a list of all insurance information (company, party, policy information, insured, etc.) associated with the case. Insurance information entered here is not displayed on the Summary Screen unless that insurance is flagged as primary, or the Include on the Case Summary button is checked on the Add/Edit Insurance panel. This page has the same functionality as Plaintiff and Defendant Insurance pages, but shows and allows the editing, adding, and deleting of insurance companies for both plaintiffs and defendants.

The Structure of This Page

| Add Defendant Insurance Company | | Add Plaintiff Insurance Company | | Insurance Companies | | | | | | | Export |
|---------------------------------|------------------|---------------------------------|--|---------------------|-------------|--|----------|------|---|--|--------|
| Party | Party Type | Insurance Company | Insurance Type | Adjuster | Policy Info | 3rd Party Insurance | Comments | Docs | | | |
| <input type="checkbox"/> | Ripspeed, Mary | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | | Ripspeed, Mary Limits: \$100,000.00 / \$300,000.00 | | | 0 | | |
| <input type="checkbox"/> | Spells, Mary-Ann | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | Jones, John | Ripspeed, Mary Limits: \$100,000.00 / \$300,000.00 | | | 0 | | |
| <input type="checkbox"/> | Ripspeed, Mary | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | | Ripspeed, Mary Limits: \$100,000.00 / \$300,000.00 | | | 0 | | |

1. Add Defendant Insurance Company button. Used to add a new defendant insurance company to the case file. See Adding a ????
2. Add Plaintiff Insurance Company button. Used to add a new plaintiff insurance company to the case file. See Adding a ????
3. Insurance Companies table. Contains the details of insurance companies and allows various actions to be performed on them. See Insurance Companies Table.

Insurance Companies Table

The Insurance Companies table is where the list of both plaintiff and defendant insurance companies related to the case is stored. Each row of the table represents an individual insurance company. See Tables for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Contacts table contains the following available columns:

| Add Defendant Insurance Company | | Add Plaintiff Insurance Company | | Insurance Companies | | | | | | | Export |
|---------------------------------|----------------------|---------------------------------|---|---------------------|-------------|--------------------------|---------------|---------------------|----------|------|--------|
| Party | Party Type | Insurance Company | Insurance Type | Adjuster | Policy Info | Include | Payments Made | 3rd Party Insurance | Comments | Docs | |
| <input type="checkbox"/> | Ripspeed, Mary | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | | <input type="checkbox"/> | | | | 0 | |
| <input type="checkbox"/> | Spells, Mary-Ann | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | Jones, John | <input type="checkbox"/> | | | | 0 | |
| <input type="checkbox"/> | Ripspeed, Mary | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | | <input type="checkbox"/> | | | | 0 | |
| <input type="checkbox"/> | Spells, Mary-Ann | Defendant | GEICO PO Box 9506 Fredericksburg, VA 22403 Stafford | Commercial | | <input type="checkbox"/> | | | | 0 | |
| <input type="checkbox"/> | Gingelbymer, John A. | Plaintiff | MetLife Auto & Home PO Box 3038 Lowell, MA 01853 Middlesex | No Fault Primary | | <input type="checkbox"/> | | | | 0 | |

1. Party: The name of the party (Lastname, Firstname format for individuals) covered by the insurance policy.
2. Party type: The party's role in the case.
3. Insurance Company: The insurance company providing coverage to the party.
4. Insurance Type: The type of insurance.
5. Adjuster: The name of the insurance adjuster assigned to the case.
6. Policy Info: The name of the insured covered by the insurance policy, the policy limits, and the claim number.
7. Include on the Case Summary Page: Whether to display this insurance company's information in the Defendant or Plaintiff section of the Case Summary Page even if the Primary box is not checked for that insurance company.
8. Payments Made: Any payments made by the insurance company.
9. 3rd Party Insurance: The name and claim number of any Third Party Administrator or Adjusting Company.
10. Comment: Any comments about the insurance company.
11. Docs: Any documents that have been attached to this insurance policy. If the number is other than zero (0), clicking on the number will bring you to a list of the documents.

12. Action: Edit icon, Copy icon, Delete icon.

Editing an Insurance Company

To edit an Insurance Company:

1. Click the **Edit icon** in the Action column of the row representing the insurance company you wish to edit. This will bring up an Add/Edit panel for insurance companies, with the existing information filled in.
2. Fill the fields in with your desired information. See [The Add/Edit Insurance Company Panel](#) for details about the fields.
3. Click Update to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Update to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Insurance Company

To delete an insurance company from the case:

1. Click the **Delete icon** in the Action column of the row representing the insurance company you wish to delete from the case. This will bring up a confirmation message (to avoid accidental deletions).
2. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the insurance company from the case, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Insurance Company

You can add a new Plaintiff Insurance Company or a new Defendant Insurance Company from the All Insurance page. To add a new insurance company:

1. Click the Add Defendant Insurance Company or the Add Plaintiff Insurance Company button. This will bring up an Add/Edit panel for insurance companies, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Case Contact Panel](#) for details about the fields.
3. Click Save to save the case contact and close the panel.
 - If you decide you do not wish to save the case contact, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Insurance Company Panel

The Add/Edit Insurance Panel allows you to fill in the details of an insurance company to the case. See Add/Edit Panels for general information about panel structure and usage. You can add either Defendant or Plaintiff Insurance Companies from the All Insurance page. See Add/Edit [Defendant] Insurance Panel and Add/Edit [Plaintiff] Insurance Panel for details on adding insurance companies from the All Insurance page.

Outstanding Items

The Outstanding Items page lists all items for which the firm is awaiting input from others. Specifically, missing information for the following will be listed:

1. Medical records requested, but not received.
2. Discovery Items that do not have Complied/Held date.
3. Opposition outstanding for Motions.
4. School verification outstanding (School Verif. Requested Date is present, but School Verif. Received Date is empty).

The Structure of This Page

| Description | Type | Party | Date | Due Date |
|---|--------------------------------------|-----------------|-----------|----------|
| Records from Vrk Medical Center for John A. Ginghamer | Medical Provider Request Outstanding | | 8/8/2019 | |
| Records from Vrk Medical Center for John A. Ginghamer | Medical Provider Request Outstanding | | 8/8/2019 | |
| Discovery outstanding: Interrogatories served by plaintiff | Litigation Discovery Outstanding | Joe Sims | 7/1/2019 | 8/1/2019 |
| Discovery outstanding: Interrogatories served by plaintiff | Litigation Discovery Outstanding | Mary-Ann Spells | 7/1/2019 | 8/1/2019 |
| Discovery outstanding: Interrogatories served by plaintiff | Litigation Discovery Outstanding | Mary Ragspeed | 7/1/2019 | 8/1/2019 |
| Billing Records from Roosevelt Hospital Division - Medical Records Dept for John A. Ginghamer | Medical Provider Request Outstanding | | 4/25/2019 | |
| Billing Records from Roosevelt Hospital Division - Medical Records Dept for John A. Ginghamer | Medical Provider Request Outstanding | | 4/25/2019 | |
| Hospital Records - No Fault from Roosevelt Hospital Division - Medical Records Dept for John A. Ginghamer | Medical Provider Request Outstanding | | 4/25/2019 | |

1. Description: The description of the outstanding item.
2. Type: The type of item that remains outstanding.
3. Party: The party who is responsible for resolving the outstanding item. If the responsible person is not a party to the litigation (for example, a medical provider who has been requested to provide medical records), this field will be blank.)
4. Date: The date the item was entered into SmartAdvocate.
5. Due Date: The date the outstanding item was due.

The Outstanding Items page is informational only; no action can be taken from this page on any of the outstanding items. However, clicking on an outstanding item's Type will bring you to the case page where the outstanding item was entered.

| Description | Type | Party | Date | Due Date |
|---|--------------------------------------|-----------------|-----------|----------|
| Records from Vrk Medical Center for John A. Ginghamer | Medical Provider Request Outstanding | | 8/8/2019 | |
| Records from Vrk Medical Center for John A. Ginghamer | Medical Provider Request Outstanding | | 8/8/2019 | |
| Discovery outstanding: Interrogatories served by plaintiff | Litigation Discovery Outstanding | Joe Sims | 7/1/2019 | 8/1/2019 |
| Discovery outstanding: Interrogatories served by plaintiff | Litigation Discovery Outstanding | Mary-Ann Spells | 7/1/2019 | 8/1/2019 |
| Discovery outstanding: Interrogatories served by plaintiff | Litigation Discovery Outstanding | Mary Ragspeed | 7/1/2019 | 8/1/2019 |
| Billing Records from Roosevelt Hospital Division - Medical Records Dept for John A. Ginghamer | Medical Provider Request Outstanding | | 4/25/2019 | |

ARB/Mediations

The ARB/Mediations page allows you to view and record the details of arbitration or mediation of the case.

The Structure of This Page

Note: The Add Event Details button and Event Details table are both associated with an individual row of the Arbitration/Mediation table, and only appear if the row is set to display subtables. For that reason, whether these tables appear in your ARB/Mediations page, and where in the Arbitration/Mediation table they appear, will depend on which row, if any, of the Arbitration/Mediation table is set to display subtables. See [Subtables and the Open/Closed Column](#).

| Add Arbitration / Mediation | | Arbitration / Mediation | | | | | Export |
|----------------------------------|---------------|--|----------------------------|--------|----------|------|--------|
| Organization | Contact Name | Plaintiff | Arbitration/Mediation Type | File # | Comments | Docs | |
| American Arbitration Association | Deutch, Barry | Gingelhum, John A., Gingelhum, Smeryna Mark, Jerry Mark, Rodney | Binding Arbitration | 12345 | | 0 | |

| Add Event Details | | Event Details | | | | | | Export |
|-------------------|---------------------------|---------------|---------------|--------------|--------------|--------------|----------|--------|
| Event Date | Last Date to Appeal Award | Mailing Date | Decision Date | Receipt Date | Case Settled | Award Amount | Comments | |
| 7/23/2018 | 8/23/2018 | | 7/23/2018 | 7/31/2018 | No | \$950,000.00 | | |

1. Add Arbitration/Mediation button. Used to add a new arbitration or mediation to the case file. See [Adding an Arbitration or Mediation](#).
2. Arbitration/Mediation table. Contains the details of arbitrations and mediations and allows various actions to be performed on them. See [Arbitration /Mediation Table](#).
3. Add Event Details button. Used to add an individual arbitration/mediation date to the case file. See [Adding an Arbitration/Mediation Date](#).
4. Event Details table. Contains the details of individual arbitration or mediation dates and allows various actions to be performed on them. See [Event Details Table](#).

Arbitration/Mediation Table

The Arbitration/Mediation table is where the details of arbitrations and mediations are stored. Each row of the table represents an individual arbitration or mediation. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Arbitration/Mediation table contains the following available columns:

| Add Arbitration / Mediation | | Arbitration / Mediation | | | | | Export |
|----------------------------------|---------------|--|----------------------------|--------|----------|------|--------|
| Organization | Contact Name | Plaintiff | Arbitration/Mediation Type | File # | Comments | Docs | |
| American Arbitration Association | Deutch, Barry | Gingelhum, John A., Gingelhum, Smeryna Mark, Jerry Mark, Rodney | Binding Arbitration | 12345 | | 0 | |

1. [column with no title]: A plus sign in this column indicates that additional information is available for the row in which the plus sign is located (in this instance, Event Details for that Arbitration or Mediation). Clicking on the plus sign opens the Event Details subtable for that Arbitration or Mediation. The plus sign then turns into a negative sign which, when clicked, closes the subtable.
2. Organization: The organization providing the arbitrator or mediator.
3. Contact Name: The arbitrator or mediator.
4. Plaintiff: The plaintiffs subject to the arbitration or mediation.
5. Arbitration/Mediation Type: The type of the arbitration or mediation.
6. File #: The file number used by the arbitration/mediation organization for this case.
7. Comments: Any comments about the arbitration or mediation.
8. Docs: The number of documents associated with the arbitration/mediation and a link to the documents in the [Documents](#) case page.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing an Arbitration or Mediation

To edit an arbitration or mediation:

1. Click the [right-click icon](#) in the untitled column of the row representing the arbitration or mediation you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for arbitrations and mediations, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Arbitration/Mediation Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Arbitration or Mediation

To delete an arbitration or mediation:

1. Click the [right-click icon](#) in the untitled column of the row representing the arbitration or mediation you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the arbitration or mediation, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.

- Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding an Arbitration or Mediation

To add a new arbitration or mediation:

1. Click the Add Arbitration/Mediation button. This will bring up an Add/Edit panel for arbitrations and mediations, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Arbitration/Mediation Panel](#) for details about the fields.
3. Click Save to save the arbitration or mediation and close the panel.
 - If you decide you do not wish to save the arbitration or mediation, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Arbitration/Mediation Panel

The Add/Edit Arbitration/Mediation Panel allows you to fill in the details of an arbitration or mediation. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. Organization: The organization providing the arbitrator or mediator.
2. Contact Name: The arbitrator or mediator.
3. Plaintiff: The plaintiffs subject to the arbitration or mediation.
4. Arbitration/Mediation Type: The type of the arbitration or mediation.
5. File #: The file number used by the arbitration/mediation organization for this case.
6. Comments: Any comments about the arbitration or mediation.

Event Details Table

The Event Details table is where the details of individual arbitration/mediation dates are stored. The Event Details table is a subtable of the [Arbitration/Mediation Table](#), which means that each row of the Arbitration/Mediation table has an individual Event Details table associated with it, which is specific to the arbitration or mediation in that row; open a row of the Arbitration/Mediation table using the open/close icon to reveal the associated Event Details table. Each row of the table represents an individual date. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Event Details table contains the following available columns:

1. Event Date: The date of the arbitration or mediation.
2. Last Date to Appeal Award: The deadline to appeal the arbitration decision to the court.
3. Mailing Date: The date the arbitrator's decision was mailed to all parties.
4. Decision Date: The date the arbitrator rendered a decision.
5. Receipt Date: The date the arbitrator's decision was received by your firm.
6. Case Settled: Whether the case was successfully settled on the mediation date.
7. Award Amount: The amount awarded to the plaintiffs as a result of the arbitration/mediation date.
8. Comments: Any comments about the arbitration/mediation date.
9. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing an Arbitration/Mediation Date

To edit an arbitration/mediation date:

1. Click the [right-click icon](#) in the untitled column of the row representing the date you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for arbitration/mediation dates, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Event Details Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting an Arbitration/Mediation Date

To delete an arbitration/mediation date:

1. Click the **right-click icon** in the untitled column of the row representing the date you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the date, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.
 - Deleting the arbitration/mediation date will not delete the appointment created through the [The Add/Edit Event Details Panel](#); you will have to delete that separately in the [Calendar](#).

Adding an Arbitration/Mediation Date

To add a new arbitration/mediation date:

1. Click the Add Event Details button. This will bring up an Add/Edit panel for arbitration/mediation dates, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Event Details Panel](#) for details about the fields.
3. Click Save to save the date and close the panel.
 - If you decide you do not wish to save the date, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Event Details Panel

The Add/Edit Event Details Panel allows you to fill in the details of an arbitration/mediation date. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. **Event Date:** The date of the arbitration or mediation. This field cannot be edited directly; to edit it, click the Add or Edit button to the right of the field, which will open an Add/Edit Appointment Panel. This field will automatically contain the start date of the appointment created through the panel.
2. **Last Date to Appeal Award:** The deadline to appeal the arbitration decision to the court.
3. **Mailing Date:** The date the arbitrator's decision was mailed to all parties.
4. **Decision Date:** The date the arbitrator rendered a decision.
5. **Receipt Date:** The date the arbitrator's decision was received by your firm.
6. **Case Settled:** Whether the case was successfully settled on the mediation date.
7. **Award Amount:** The amount awarded to the plaintiffs as a result of the arbitration/mediation date.
8. **Comments:** Any comments about the arbitration/mediation date.

Time Tracking

The Time Tracking page allows you to view and record the details of activity for which you need to track your time spent. Note: this page does not itself track the time spent on an activity. Use the Time Tracking icon to actually track time. However, the system will automatically take you to this page at the end of a session of time tracking in order to save the record in the system.

The Structure of This Page

| Summary | | | | | | | | | | | | |
|------------------------|--------------------|--------------------|-------------------|-----------------|-------------------|--------------------|---------------|--|--|--|--|--|
| Plaintiffs | Total | Biliable | | | | | Non-Biliable | | | | | |
| | | No Status | Invoice | Paid | Performed | Total | | | | | | |
| Robinson, Terry-Ann L. | \$10,268.33 | \$6,633.33 | \$1,335.00 | \$200.00 | \$2,300.00 | \$10,268.33 | \$0 | | | | | |
| Jane, Marie | \$5,368.33 | \$2,833.33 | \$235.00 | \$200.00 | \$1,100.00 | \$5,368.33 | \$0 | | | | | |
| SIMPSON, CLAUDE R. | \$18,618.33 | \$15,883.33 | \$235.00 | \$200.00 | \$2,300.00 | \$18,618.33 | \$0 | | | | | |
| | \$34,254.99 | \$26,349.99 | \$1,605.00 | \$600.00 | \$5,700.00 | \$34,254.99 | \$0.00 | | | | | |

| Time Tracking | | | | | | | | | | | | |
|---------------|--------|-----------------------|---|---------------|------------|----------|----------|--------------|-----------------|-----------|-------------------------------------|--------------------------|
| Activity | Status | Staff | Plaintiffs | Tracking Date | Start Time | End Time | Duration | Billing Rate | Biliable Amount | Biliable? | Shared Expenses | Comments |
| Discovery | | Simpson, Claude, Eric | SIMPSON, CLAUDE R. | 2/15/2016 | 10:00 AM | 12:30 PM | 02:30 | \$250.00 | \$500.00 | Yes | <input type="checkbox"/> | |
| Discovery | | Admin, A. | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/25/2016 | 02:42 PM | 03:12 PM | 00:30 | | | No | <input checked="" type="checkbox"/> | |
| Research | | Selichuk, Igor | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/25/2016 | 09:00 AM | 11:00 AM | 02:00 | | | No | <input checked="" type="checkbox"/> | Medical records research |

1. Summary table. Displays the total monetary values (billable, non-billable, and overall) of the tracked time spent on behalf of each plaintiff. See [Summary Table](#).
2. Add Time Tracking button. Used to add a new span of tracked time to the case file. See [Adding Tracked Time](#).
3. Time Tracking table. Contains the time tracking details and allows various actions to be performed on them. See [Time Tracking Table](#).

Summary Table

The Summary table totals the billing amounts in the Time Tracking table. It is updated automatically when changes are made to the Time Tracking table; no changes may be made to the Summary table directly. Each row of the table represents an individual plaintiff. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Summary table contains the following columns:

| Plaintiffs | Total | Billable | | | | | Total | Non-Billable |
|------------------------|--------------------|--------------------|-------------------|-----------------|-------------------|--------------------|---------------|--------------|
| | | No Status | Invoiced | Paid | Performed | Total | | |
| Robinson, Terry-Ann L. | \$10,268.33 | \$6,633.33 | \$1,135.00 | \$200.00 | \$2,300.00 | \$10,268.33 | \$0 | |
| Jane, Marie | \$5,368.33 | \$3,833.33 | \$235.00 | \$200.00 | \$1,100.00 | \$5,368.33 | \$0 | |
| SIMPSON, CLAUDE R. | \$18,618.33 | \$11,883.33 | \$235.00 | \$200.00 | \$2,300.00 | \$18,618.33 | \$0 | |
| | \$34,254.99 | \$26,349.99 | \$1,605.00 | \$600.00 | \$5,700.00 | \$34,254.99 | \$0.00 | |

1. Plaintiffs: The plaintiff whose time tracking totals are listed.
2. Total: The total value of all tracked time spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.
3. Billable No Status: The total value of all tracked time spent on the plaintiff's behalf that does not have a status attached to it. The sum of this column across all rows in the table appears below the last row of the column.
4. Billable Invoiced: The total value of all tracked time spent on the plaintiff's behalf which has been included on an invoice. The sum of this column across all rows in the table appears below the last row of the column.
5. Billable Paid: The total value of all tracked time spent on the plaintiff's behalf for which your firm has been paid. The sum of this column across all rows in the table appears below the last row of the column.
6. Billable Performed: The total value of all tracked time spent on the plaintiff's behalf for which the status is Performed.. The sum of this column across all rows in the table appears below the last row of the column.
7. Billable Total: The total value of all billable tracked time spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.
8. Non-Billable Amount: The total value of all non-billable tracked time spent on the plaintiff's behalf. The sum of this column across all rows in the table appears below the last row of the column.

Time Tracking Table

The Time Tracking table is where the details of spans of tracked time are stored. Each row of the table represents an individual span of time. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Time Tracking table contains the following available columns:

| Activity | Status | Staff | Plaintiffs | Tracking Date | Start Time | End Time | Duration | Billing Rate | Billable Amount | Billable? | Shared Expenses | Comments | Action |
|-----------|--------|-----------------------|---|---------------|------------|----------|----------|--------------|-----------------|-----------|-------------------------------------|--------------------------|--------|
| Discovery | | Simpson, Claude, Esq. | SIMPSON, CLAUDE R. | 2/15/2016 | 10:00 AM | 12:30 PM | 02:30 | \$250.00 | \$500.00 | Yes | <input type="checkbox"/> | | |
| Discovery | | Admon, A. | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/25/2016 | 02:42 PM | 03:12 PM | 00:30 | | | No | <input checked="" type="checkbox"/> | | |
| Research | | Selchuk, Igor | Jane, Marie; Robinson, Terry-Ann L.; SIMPSON, CLAUDE R. | 4/28/2016 | 09:00 AM | 11:00 AM | 02:00 | | | No | <input checked="" type="checkbox"/> | Medical records research | |

1. Activity: The type of activity being performed during the span of time.
2. Status: The status of the activity.
3. Staff: The staff member performing the activity.
4. Plaintiffs: The plaintiffs on whose behalf the activity was performed.
5. Tracking Date: The date the activity was performed.
6. Start Time: The start of the span of time.
7. End Time: The end of the span of time.
8. Duration: The length of the span of time, expressed in hours and minutes.
9. Billing Rate: The amount billed for the activity, per hour.
10. Billable Amount: The total value of the activity over the span of time.
11. Billable?: Whether the span of time represents billable hours.
12. Shared Expenses: Whether the total value of the activity should be split equally among all plaintiffs.
13. Comments: Any comments about the span of time.
14. Action: [Right-click icon](#); right-click menu contains Edit and Delete.

Additional columns are available for the Time Tracking table, which can be added by clicking on the Show/Hide Columns button. Columns can also be hidden using the Show/Hide Columns button. See [Tables](#) for general information about table structure and usage. The additional available columns are: Duration (hours), Invoice #, Invoice Date, Status Date.

Editing Tracked Time

To edit a span of tracked time:

1. Click the [right-click icon](#) in the Action column of the row representing the span of time you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Edit icon](#) in the Actions column of the row representing the span of time you wish to edit. This will bring up an Add/Edit panel for tracked time, with the existing information filled in. Skip to step 3.

2. Click the Edit option in the menu. This will bring up an Add/Edit panel for tracked time, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Time Tracking Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Tracked Time

To delete a span of tracked time:

1. Click the [right-click icon](#) in the Action column of the row representing the span of time you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
 - Alternatively, you can click the [Delete icon](#) in the Actions column of the row representing the span of time you wish to delete. This will bring up a confirmation message (to avoid accidental deletions). Skip to step 3.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the span of time, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Tracked Time

To add a new span of tracked time:

1. Click the Add Time Tracking button. This will bring up an Add/Edit panel for tracked time, blank except for defaults.
2. Fill the fields in with your desired information. See [The Add/Edit Time Tracking Panel](#) for details about the fields.
3. Click Save to save the span of time and close the panel.
 - If you decide you do not wish to save the span of time, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Time Tracking Panel

The Add/Edit Time Tracking Panel allows you to fill in the details of a span of tracked time. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

The screenshot shows the 'Edit Time Tracking' panel with the following fields and callouts:

- 1. Staff: Simpson, Claude
- 2. Activity: Deposition: Prep/Talk
- 3. Status: Performed
- 4. Status Date: [blank]
- 5. Invoice #: [blank]
- 6. Invoice Date: [blank]
- 7. Tracking Date: 07/12/2011
- 8. Start Time: 11:00
- 9. End Time: 03:00 PM
- 10. Duration: 4:00
- 11. Duration (hours): 4.00
- 12. Billing Rate: \$750.00
- 13. Billable Amount: \$3,000.00
- 14. Billable?:
- 15. Shared Expenses:
- 16. Plaintiffs: Jane, Marie Robinson, Terry-Ann I. SIMPSON, CLAUDE R.
- 17. Comments: Training

Created at 7/12/2016 3:16:00 PM by Simpson, Claude, Etc.
Modified at 4/18/2018 3:00:00 PM by Dreier, Harry.

1. Staff: The staff member performing the activity.
2. Activity: The type of activity being performed during the span of time.
3. Status: The status of the activity being performed.
4. Status Date: The date on which the current status was set for the activity.
5. Invoice #: The identification number of the invoice on which the activity was billed.
6. Invoice Date: The date on which the invoice on which the activity was bill was issued.
7. Tracking Date: The date the activity was performed.
8. Start Time: The start of the span of time. If the End Time field is not blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to reflect the time difference between this field and the End Time field. If the End Time field is blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to zero, and set the End Time field to the time in this field.
9. End Time: The end of the span of time. If the End Time field is not blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to reflect the time difference between the Start Time field and this field. If the End Time field is blank, changing the time in this field will automatically set the Duration and Duration (hours) fields to zero, and set the End Time field to the time in this field.
10. Duration: The length of the span of time, expressed in hours and minutes. Changing this field will automatically set the Duration (hours) field to the equivalent of this field in hours with decimal points. If the Start Time field is not blank, changing this field will automatically set the End Time field to the time in the Start Time field plus the length of time in this field. If the Start Time field is blank, changing this field will automatically set the Start Time field to the current time, and set the End Time field to the current time plus the length of time in this field.
11. Duration (hours): The length of the span of time, expressed in hours, with two decimal points. Changing this field will automatically set the Duration field to the equivalent of this field in hours and minutes. If the Start Time field is not blank, changing this field will automatically set the End Time field to the time in the Start Time field plus the length of time in this field. If the Start Time field is blank, changing this field will automatically set the Start Time field to the current time, and set the End Time field to the current time plus the length of time in this field.
12. Billing Rate: The amount billed for the activity, per hour. If this field is not blank, clicking the Auto Calculate button next to it will automatically set the Billable Amount field to the amount in this field times the number of hours in the Duration field, counting minutes as 1/60 of an hour.
13. Billable Amount: The total value of the activity over the span of time.
14. Billable?: Whether the span of time represents billable hours.

15. Shared Expenses: Whether the total value of the activity should be split equally among all plaintiffs. If neither this field nor any of the checkboxes in the Plaintiffs field is selected, the record will not save.
16. Plaintiffs: The plaintiffs on whose behalf the activity was performed. This field is uneditable if Shared Expenses is selected. If neither Shared Expenses nor any of the checkboxes in this field is selected, the record will not save.
17. Comments: Any comments about the span of time.

Funding

The Funding page allows you to view and record the details of case funding. The "Funding" referred to on this page is case funding; money borrowed by your firm to finance the expenses of the litigation.

The Structure of This Page

| Funded By | Need to Pay Back | Comment |
|---------------------|------------------|---------|
| Social Media - Yelp | 5% Net | |

1. Add Case Funding button. Used to add new case funding to the case file. See [Adding Case Funding](#).
2. Case Funding table. Contains the case funding details and allows various actions to be performed on them. See [Case Funding Table](#).

Case Funding Table

The Case Funding table is where the details of case funding are stored. Each row of the table represents an individual funding company. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Case Funding table contains the following available columns:

| Funded By | Need to Pay Back | Comment | |
|---------------------|------------------|---|--|
| Social Media - Yelp | \$50,000.00 | Interest due at conclusion of case at the rate of 12% | |

1. Funded By: The company funding the case.
2. Need to Pay Back: The amount owed to the funding company after the conclusion of the case.
3. Comment: Any comments about the funding.
4. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing Case Funding

To edit case funding:

1. Click the [right-click icon](#) in the untitled column of the row representing the funding you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for case funding, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Case Funding Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Case Funding

To delete case funding:

1. Click the [right-click icon](#) in the untitled column of the row representing the funding you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the funding, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Case Funding

To add new case funding:

1. Click the Add Case Funding button. This will bring up an Add/Edit panel for case funding, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Case Funding Panel](#) for details about the fields.
3. Click Save to save the funding and close the panel.

- If you decide you do not wish to save the funding, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Case Funding Panel

The Add/Edit Case Funding Panel allows you to fill in the details of case funding. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

1. **Funded By:** The company funding the case.
2. **Need to Pay Back:** Whether the amount owed to the funding company is calculated as a portion of the net firm fee or as an absolute amount.
3. **% of the Net Firm Fee:** The portion of the net firm fee owed to the funding company after the conclusion of the case. This field is uneditable and ignored unless % of the Net Firm Fee is selected in the Need to Pay Back field.
4. **Amount:** The amount owed to the funding company after the conclusion of the case. This field is uneditable and ignored unless Amount is selected in the Need to Pay Back field.
5. **Comment:** Any comments about the funding.

All Contacts

This page is currently under construction. Check back for updates!

Bankruptcy

This page is currently under construction. Check back for updates!

Case Value

This page is under construction. Please check back for updates.

[How to Use the Case Value Page in SmartAdvocate](#)

Custom View Pages

This page is currently under construction. Check back for updates!

Funding

This page is currently under construction. Check back for updates!

Member - MDL Cases

This page is currently under construction. Check back soon for updates!

Other Cases

This page is currently under construction. Check back for updates!

Time Tracking

This page is currently under construction. Check back for updates!

VA Claims

The VA Claims screen allows for the viewing and recording of information related to the VA Claims in the case.

Structure of This Page

Claims Table

The claims table lists information for all VA claims associated with the case. The information included in this table includes:

| Claims | | | | | | | Export |
|-------------------|-------------------------|-------------------------|-------------------------|------------------------------|------------------------|--------|--------|
| VA Claim 1 | Current Status 2 | Current Rating 3 | Effective Date 4 | Goal Effective Date 5 | Notes 6 | Action | |
| 123456 | Board Denial | 50 | 4/3/2023 | 4/5/2023 | Notes about this claim | | |

1. VA Claim number
2. Current status of VA claim
3. Current rating of VA claim

4. Claim rating effective date
5. Goal effective date of new rating
6. Notes associated with this VA claim

Adding a VA Claim

By clicking the Add Claim button, the following information can be indicated:

Add/Edit Claim ✕

VA Claim: **1**

Current Status: **2** ▼

Current Rating: **3**

Effective Date: **5** ▼

Goal Effective Date: **6** ▼

Notes: **7**

SAVE
CANCEL

1. VA Claim number
2. Current status of VA claim
3. Current rating of VA claim
4. Claim rating effective date
5. Goal effective date of new rating
6. Notes associated with this VA claim

Claims Stream Sub-Table

Once a claim has been added to the case, the claim can be expanded to reveal the claims stream sub-table. The claims stream sub-table lists information for all claims events related to this VA claim. The information included in this table includes:

ADD CLAIMS EVENT

Claims Stream

Export

| Event 1 | Date 2 | Appealed Issue 3 | Action |
|----------------|---------------|-------------------------|--------|
| Board Grant | 4/7/2023 | Entitlement | |

Page 1 of 1 (1 items) < 1 >
LAYOUT

1. Claim event
2. Event date
3. Appealed issue

Adding a Claims Event

By clicking the Add Claims Event button, the following information can be indicated:

Add/Edit Claims Event ✕

Event: **1** ▼

Date: **2** _/_/____ ▼

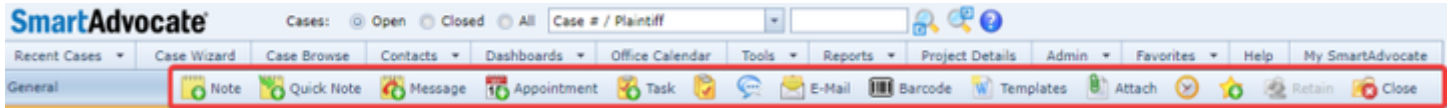
Appealed Issue: **3** ▼

SAVE
CANCEL

1. Claim event
2. Event date
3. Appealed issue

Case Quick Action Tool Bar

The Quick Action Tool Bar is always available once a case file is opened and is accessible from any screen in the case in SmartAdvocate®.



Add Note

Add a Note

Click on the Note icon to add a new Note to the case.



See Notes for details about adding Notes to a case.

Add Quick Note

Quick Note is a very convenient way of quickly entering some of the most often used notes. Some 'Quick Notes' also satisfy the 'Client Contact' requirements set elsewhere in SmartAdvocate®. For example, entering the Quick Note "Called Client - Left message on machine" will remove the case from the client contact needed list and reset the timer for client contact for that case. (See Last Modified Note Report, Modified Note Report).



Add a Quick Note

1. Click 'Quick Note' from the Quick Action Tool Bar. A "pick list" similar to the following will be displayed:

Category: All email letter

Select a Quick Note

- Called Adjuster and left a message on voice mail
- Called Client - Left message & Sent email
- Called Client - Left message on machine
- Called Client - Left message regarding signup kit
- Called Client - Left message with a person who answered the phone
- Called Client - No answer - No machine
- Called Client - Updated Client on Case Status
- Called Client - Updated contact information
- Called client- voicemail is full
- Case signed by investigator
- Client Mailed Kit Back
- Closed and sent letter - No target injury
- Closed and sent no contact - Reject
- Emailed Adjuster
- Emailed Adjuster
- Exhibits double-checked and ready to submit
- Sent contact email to Client

Add Add & Edit Cancel

1. Choose from among the list of pre-defined "quick notes".
2. Click Add to add the Quick Note to the Notes page in the case. Click Add & Edit to edit the quick note before saving it in the case.

Add Phone Message

Add a Telephone Message

1. Click on the Message button on the Quick Action Button Bar.



1. The dialog box will be pre-populated with certain information, highlighted in the image below. The pre-populated information includes: the plaintiff's name and telephone number and the paralegal's name. The subject line will also be filled in with the following text:

"Call [name of plaintiff] back at [primary telephone number]"

 A screenshot of the 'Add Telephone Message' dialog box. The dialog has a title bar 'Add Telephone Message' and a close button. It contains several fields:

- 'From': Ginglehymers, John A. - (P)-Owner/Operator,Asset Co-Owner,D (highlighted in yellow)
- 'Phone Number': (516) 555-1212 (highlighted in yellow)
- 'Assigned To': Ramadan, Schery, Esq. (highlighted in yellow)
- 'Subject': Call John A. Ginglehymers back at (516) 555-1212 (highlighted in yellow)
- 'Description': John A. Ginglehymers called; would like to discuss settlement with you.
- 'Email To': Ramadan, Schery, Esq. (with a checked 'CC Me' box)

 At the bottom are 'Save' and 'Cancel' buttons.

1. Edit or modify the information in the From, Phone Number, Assigned To and Subject dialog boxes as necessary.
2. Enter any desired information in the Description box.
3. You can add an email address to the cc field to copy someone else on the telephone message.
4. The 'cc me' box will be checked by default. Un-check this box if you do not wish to have a copy of the message emailed to you.
5. Click Save to finish and save the message
6. An task will be created for the staff member assigned on the message and a copy emailed to others as specified. The Task will be listed in the Task section of SmartAdvocate®. Upon completion of the task, the item will be removed from the open tasks.

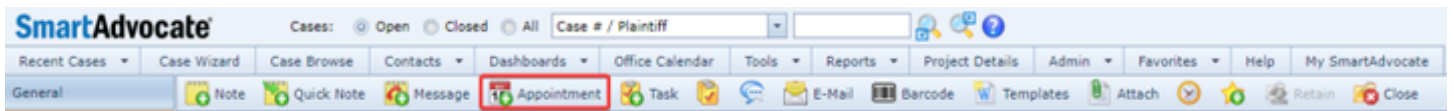
Add Appointment

Add an Appointment

An Appointment can be entered either by clicking on the "Appointment" icon on the "Quick Action Tool Bar" or by clicking on the "Add Appointment" tab in the "Case Calendar" or "Office Calendar." If an appointment is "case related," it **must** be entered from the case. All appointments adding using the Appointment icon n the Quick Action Tool Bar will be related to the case you are in. Case Appointments created in SmartAdvocate® are added to the calendar for the specific case in which the appointment is made and also added to the Office Calendar. (Appointments that are not case related **must** be created from the Office Calendar.) An appointment can also be flagged as 'personal' at the time it is created (see How to Mark Appointment as 'personal'). If you have Microsoft Outlook® integrated with SmartAdvocate®, the item is also automatically sent to your Outlook calendar via a calendar invitation email. (See also, How to Modify An Item On The Calendar). (See generally, Office Calendar).

Using the Appointment Icon

1. Click on the 'Appointment' button on the task bar.



1. See Adding an Appointment for details on adding appointments.

Add Task

The 'Add Task' button allows quick access to add (assign) a new task to a staff member right from any screen in SmartAdvocate®.

Add a Task

1. Click the 'Add Task' button.



1. See Adding a Task for details on adding tasks.

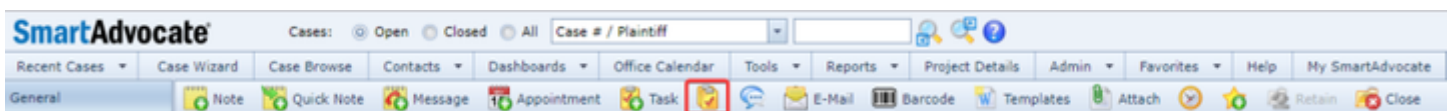
Add Multiple Tasks

Add Multiple Tasks

The 'Add Multiple Tasks' button allows quick access to simultaneously add (assign) multiple new tasks to a staff member right from any screen in SmartAdvocate®.

Using the Add Multiple Tasks Icon

1. Click the 'Add Multiple Task' button.



1. The Add Multiple Tasks panel will open.
2. The Multiple Tasks available are based on task groups. See Task Groups for additional information on creating task groups. Note that task groups require Task Templates.

Adding Multiple Tasks

Multiple tasks can be added to a case using The Add Multiple Tasks panel.

| Task | Description | Assigned To | Due Date | Days |
|-------------------------|--------------|---------------|------------|------|
| Custom Task | | | | |
| Medical records Request | | | 08/06/2018 | 20 |
| some QA test | | Krasnko, Yana | 07/19/2018 | 2 |
| Test-Yana | testing task | Krasnko, Yana | 07/19/2018 | 2 |

1. Task Requestor: The name of the staff member who has requested that these tasks be completed. By default, the task requestor will be the staff member who created the multiple tasks request.
2. Send Email to Requestor: Whether to send an email to the task requestor upon creation of the multiple tasks.
3. Tasks Groups: The tasks groups from which the tasks groups will be available. See Task Groups for additional details.
4. Send Email to Assignee: Whether to send an email to the assignee upon creation of the multiple tasks.
5. Task: A list of task templates that have been added to the chosen task group. By default, all available task templates will be included in the multiple tasks assignment, however you can chose which task templates are actually included using the check boxes.
6. Description: Any description attached to the task template.
7. Assigned To: The name of the staff member to whom each task has been assigned. When creating multiple tasks, each individual task can be assigned to a different staff member.
8. Due Date: The date by which each individual task must be completed. When creating multiple tasks, each individual task can have a different due date.
9. Days: The number of days from the date the tasks are created by which each individual task must be completed. When creating multiple tasks, each individual task can have a different due date. Changing the number in the Days column will also change the due date for that task.

Send Text Message

Sending a Test Message

SmartAdvocate® can be integrated with several text messaging services. When enabled, this integration will allow you to send and receive text messages in SmartAdvocate®. Photographs can be received as part of a text message, if your text messaging service supports this function. The number of characters allowable in a text message is dependent upon the particular text messaging service. [Please contact SmartAdvocate® at 1-877-GET-SMART (1-877-438-7627) if you need additional information or to have Texting Integration implemented on your system]. Individual as well as mass text messages are supported.



Sending Texts

Click on the Text Message Icon to display the text dialog box.

 A screenshot of the 'Send Text' dialog box. The dialog box has a title bar 'Send Text' with a close button. It contains four main sections:

- To:** A dropdown menu showing 'Ginglehymer, John A. (P)-Owner/Operator,Asset Co-t' with a red circle '1' next to it.
- Phone number:** A text input field containing '(516) 234-4567' with a red circle '2' next to it.
- Use Template:** A dropdown menu showing 'Default' with a red circle '3' next to it.
- Text:** A text area containing the message: 'Hello John, Please call Schery Ramadan, Esq. at SmartAdvocate, LLC, (516) 723-4670, at your earliest convenience. Thank you!' with a red circle '4' next to it.

 At the bottom, there is a 'Characters remaining: 4876' indicator and 'Send' and 'Cancel' buttons.

1. To: The name of any contact from the case to whom the text will be sent.
2. Phone number: The phone number to which the text will be sent. The dropdown will list all phone numbers for the chosen contact, along with a designation of which have been marked on the Contact Card as being capable of receiving texts.
3. Use Template: Allows you to use any Text Template that have been set up in your system.
4. Text: The text of the message that will be sent.

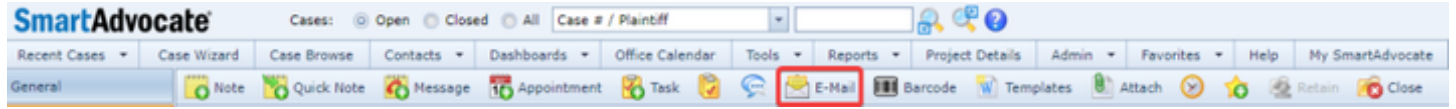
Mass Texts

The Mass Texting option is available from the Case Browse results page. See Mass Texting for details.

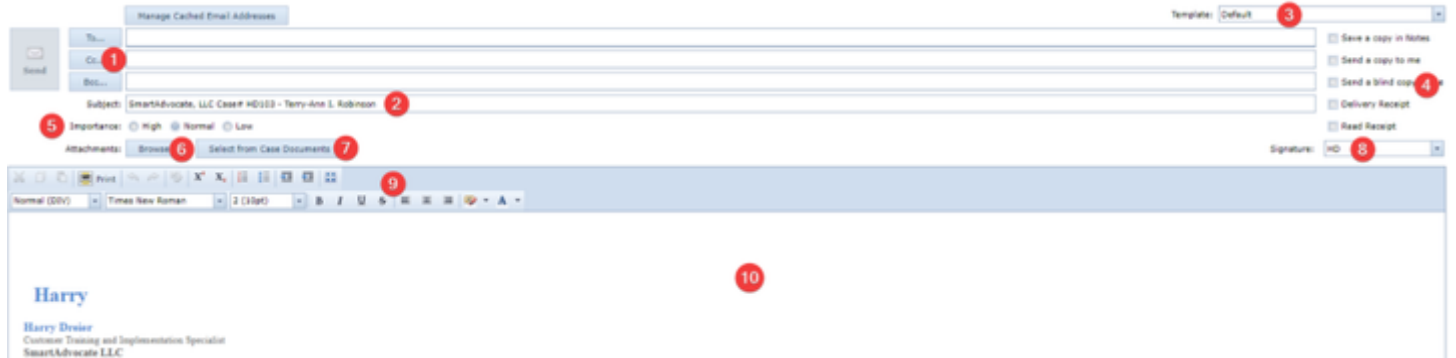
E-Mail

Sending an Email

The Email button allows you to send an email from any page within the case. SmartAdvocate lets you to choose whether emails created within the system will use the SmartAdvocate email client or open an Outlook email panel to send your emails. See User Preferences for details. To send an email from within a case, click on the E-Mail button on the Quick Action Tool Bar. Depending on the option you have chosen in User Preferences, either the SmartAdvocate or the Outlook email creation panel will open.



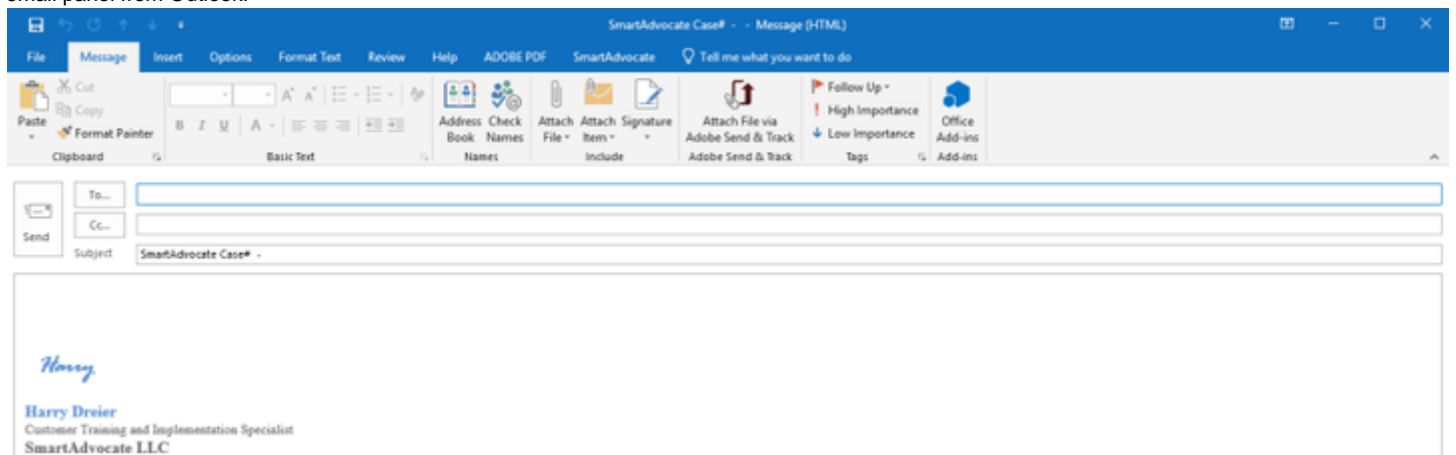
Using SmartAdvocate to Send Emails



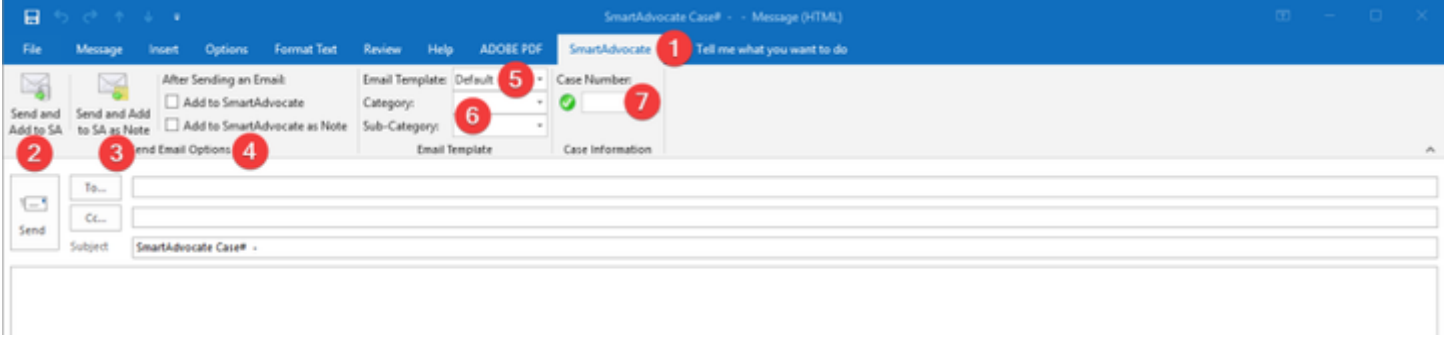
1. Address: Click on the "To", "Cc", or "Bcc" buttons to choose the email addresses to which the email will be sent. A panel will open, which will provide four options from which the choice can be made: Case Contacts, Case Staff, Law Firm Staff, and All Contacts. You can also enter the email address of anyone who is not a contact in SmartAdvocate.
2. Subject: SmartAdvocate will automatically insert your firm name, case number, and primary plaintiff's name. You can overwrite, edit, or change the entry as desired.
3. Template: Choose a template for use in the email. See Email Templates for details.
4. Email Options: You can choose among Save a copy in Notes, Send a copy to me, Send a blind copy to me, Delivery Receipt, and Read Receipt. SmartAdvocate will remember your choices and automatically select them the next time you create an email.
5. Importance: Choose the importance of the email, between High, Normal, and Low.
6. Browse: Browse your computer for any files to attach to the email.
7. Select from Case Documents: Opens a panel listing all documents that are in the case and allows you to choose which ones to attach to the email.
8. Signature: Automatically attaches your email signature to the email, and allows you to manage your email signatures for use in SmartAdvocate.
9. Formatting Options: Various options for formatting the text in the email.
10. Body of Email: Insert any text into the body of the email.

Using Outlook to Send Emails from within SmartAdvocate

When "Use Outlook to Send Emails" is chosen in User Preferences, clicking on the E-Mail button within a case in SmartAdvocate will open a create email panel from Outlook.



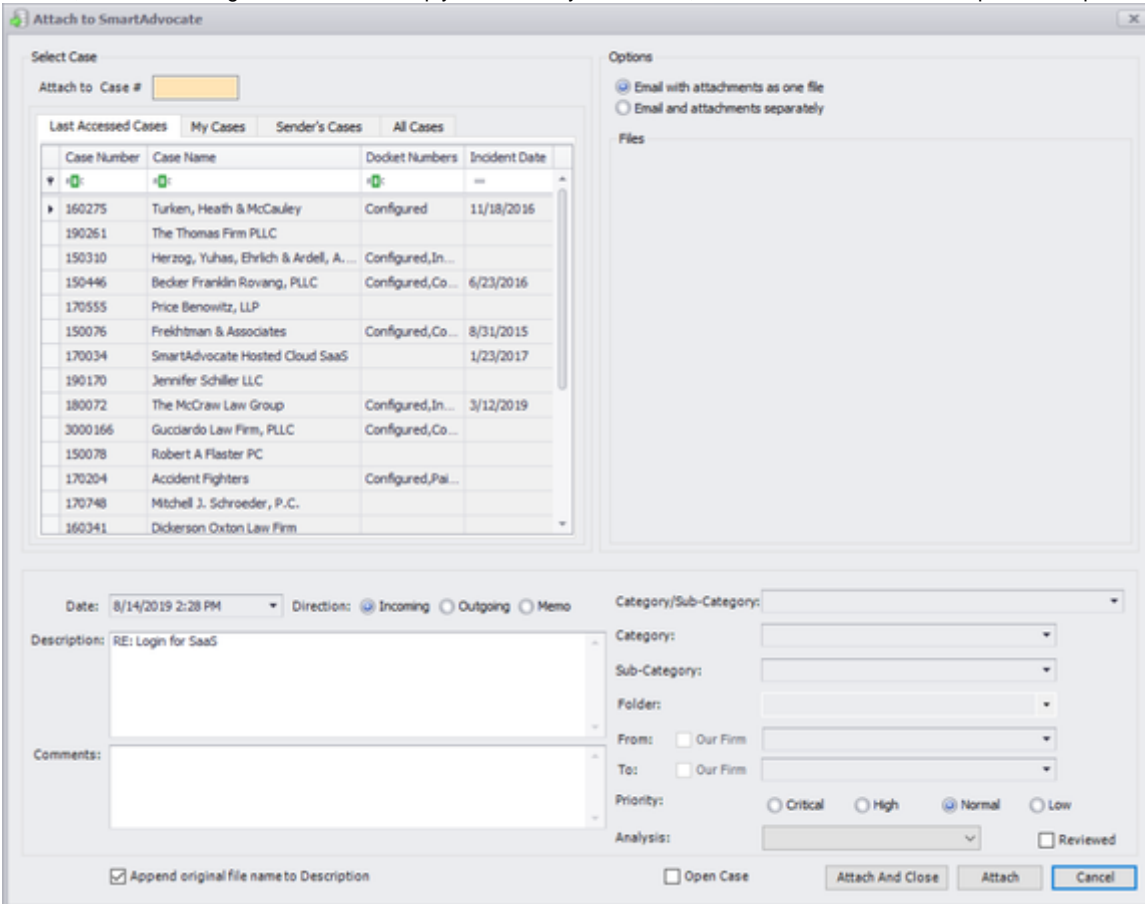
Please refer to Outlook's help file for assistance creating and sending emails from Outlook. Once the Outlook plugin has been installed on a workstation, a SmartAdvocate tab will appear in the create email panel in Outlook.



1. SmartAdvocate tab: Click on the SmartAdvocate tab to access functionality available through the Outlook plugin.
2. Send and Add to SA: Click to send the email and attach it to the case.
3. Send and Add to SA as Note: Click to send the email and attach it to the case as a Note.
4. After Sending an Email: Click on Add to SmartAdvocate or Add to SmartAdvocate as Note to automatically open the SmartAdvocate tab after clicking Send whenever creating an email in Outlook. See Automatically Attach Sent Emails below for details.
5. Email Template: Opens a dropdown allowing you to choose an email template to use for the email. See Email Templates for details about the creation and use of email templates.
6. Category and Sub-Category: Open dropdowns to choose the category and sub-category for the email. See Email Category and Email Sub-Category for details.
7. Case Number: Enter the case number for the case into which you want the email to be attached.

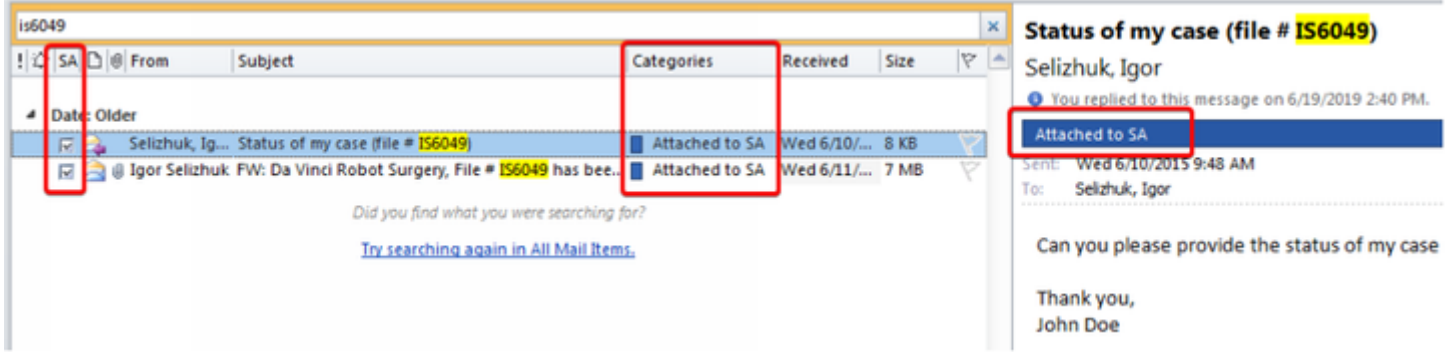
Automatically Attach Sent Emails

Once you have checked the Add to SmartAdvocate or Add to SmartAdvocate as Note buttons as described above, whenever you send an email from Outlook, either as an original email or as a reply to an email you received, the Attach to SmartAdvocate panel will open.



This panel will allow you to select the case to which the email should be attached and set the properties for the email. Emails in Outlook that have been attached to a case in SmartAdvocate using the SmartAdvocate Outlook Plugin will be marked with "Attached to SA"

category as well as a checkbox in the custom "SA" column.



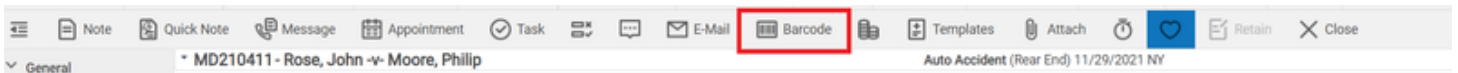
Using Barcoding

Creating a Barcode for Scanning

The 'Barcode' button allows quick access to the Barcode integration from anywhere within a case. See [Setting Up Barcode Scanning](#) for details about setting up the Barcode integration. Using Barcodes allows you to scan multiple documents simultaneously and have each document attach to the appropriate case with the appropriate properties. Simply create and print the barcode and place it on top of the document to be scanned. Repeat this process for each document to be scanned and place each document (with the Barcode page on the top of each one) on top of each other. The entire pile of documents can then be scanned together (up to the page limits of your scanner).

Using the Barcode Icon

1. Click the 'Barcode' button.



2. Choose the appropriate document category and subcategory, date, direction, and delivery method. The direction for the document will automatically be selected as incoming.

Generate Barcode for Case Number: MD210411

Search category/subcategory:

Document Date: 2/14/2023 1:35:07 PM

Direction: Incoming Outgoing Memo

Folder:

Delivery method:

Document category*

| | | | | | |
|--|--|--|---|--|---|
| <input type="radio"/> Application | <input type="radio"/> Correspondence | <input type="radio"/> Engineering Report | <input type="radio"/> Investigations | <input type="radio"/> Nurses | <input type="radio"/> Research |
| <input type="radio"/> Arbitration | <input type="radio"/> Court | <input type="radio"/> Envelope | <input type="radio"/> Legalback | <input type="radio"/> Order To Show Cause (OTSC) | <input type="radio"/> Retainer/Closing Statements |
| <input type="radio"/> AssureSign | <input type="radio"/> Defendant | <input type="radio"/> Exchange Mail | <input type="radio"/> Liens | <input type="radio"/> Orders | <input type="radio"/> SNP test |
| <input type="radio"/> Attorney Fees | <input type="radio"/> Defendant Insurance Company | <input type="radio"/> Exhibit | <input type="radio"/> Mediation | <input type="radio"/> Other | <input type="radio"/> Social Security |
| <input type="radio"/> Bank | <input type="radio"/> Department of Veterans Affairs | <input type="radio"/> Expenses | <input checked="" type="radio"/> Medical | <input type="radio"/> Plaintiff | <input type="radio"/> Surrogate Court |
| <input type="radio"/> Bankruptcy | <input type="radio"/> Diagnostic Log | <input type="radio"/> Expert | <input type="radio"/> Medical Malpractice | <input type="radio"/> Plaintiff Attorney | <input type="radio"/> Test JV |
| <input type="radio"/> Bates Numbered Documents | <input type="radio"/> Disability | <input type="radio"/> Forms | <input type="radio"/> Memorandum | <input type="radio"/> Plaintiff Insurance Co. | <input type="radio"/> Transcripts |
| <input type="radio"/> Check | <input type="radio"/> Disclosure | <input type="radio"/> HD Test | <input type="radio"/> Motion | <input type="radio"/> Pleadings/Legal | <input type="radio"/> Trial |
| <input type="radio"/> Closed | <input type="radio"/> Discovery | <input type="radio"/> IME | <input type="radio"/> Motions & OTSC | <input type="radio"/> Police Report | <input type="radio"/> Witness |
| <input type="radio"/> Closing Statement Checks | <input type="radio"/> Education | <input type="radio"/> Immigration Notice | <input type="radio"/> Negotiations | <input type="radio"/> Prior Attorney | <input type="radio"/> Worker Compensation |
| <input type="radio"/> Contract | <input type="radio"/> Employment | <input type="radio"/> Intake | <input type="radio"/> Notice of Claim | | |

Document sub-category*

| | | | | | |
|---|--|---|--|--|---|
| <input type="radio"/> Billing | <input type="radio"/> Invoice (Record Retrieval Company) | <input type="radio"/> Letter | <input type="radio"/> Not A Patient | <input type="radio"/> Records | <input type="radio"/> Reject |
| <input type="radio"/> Chronology | <input type="radio"/> Invoice With Records | <input type="radio"/> Medical Records For Trial | <input type="radio"/> Operative Report | <input type="radio"/> Records and Itemized Billing Statement | <input type="radio"/> Reject (Info Missing) |
| <input type="radio"/> Disability Letter | <input type="radio"/> Invoice with Reject | <input type="radio"/> Medical Records Summary | <input type="radio"/> Original Medical Records | <input type="radio"/> Records Clean | <input type="radio"/> Reports |
| <input type="radio"/> Invoice | <input type="radio"/> Invoice with Reject(Info Missing) | <input type="radio"/> No records found for client | <input type="radio"/> Other | <input type="radio"/> Records for Review | <input type="radio"/> Request |

Description:

3. Add a document description (optional but highly recommended).

Description:

From* [Show all](#)

4. Choose the appropriate party from whom the document was received and to whom it was sent, by default the "To" field will be selected as your law firm.

From* [Show all](#)

Alliance Physical Therapy Abbott Northwestern Hospital Beth Israel Mount Sinai Rose, Alexis Rose, Moira
 Amsterdam Memorial Health Center Abdo, M.D., Nabil Jack Martin Fund Clinic at Mount Sinai Rose, David SmartAdvocate, LLC
 Spine Care & Pain Management Absolute Best Care Physical Therapy Moore, Estelle Rose, John Transcare Care Ambulance
 AAA All Family Chiropractic
 Other Person : Other Organization :

To*

Alliance Physical Therapy Bialystock, Max Kramer, John Rock 'n Rosmarin Social Media - Facebook
 Amsterdam Memorial Health Center Borzino Law Firm Laguna Beach Police Department Rose, Alexis Star Wars Design and Construction, LLC
 Spine Care & Pain Management Conference, Room A Law Office of Schery Ramadan Rose, David State Insurance Fund
 AAA All Family Chiropractic Conference, Room B Moore, Estelle Rose, John State of Minnesota
 Abate, Nicole DaVita Olympia Fields Dialysis Center Moore, Philip Rose, Moira Statefarm
 Abbott Northwestern Hospital Delfel, Marina New York City Police Department - 1st Precinct Scaterico, Judy-Ann Supreme Court Queens County
 Abdo, Nabil, M.D. District Court of Eastern District of Louisiana New York State Department of Motor Vehicles Schindler, Judith The Offices of Bialystock & Bloom, LLP (Headquarters)
 Absolute Best Care Physical Therapy District Court of Southern District West Virginia North, Michael B. Scrooge, Anabelle Third Party Adjusters, LLC
 Adams, Jake Dreier, Harry Parker Waichman LLP Simmons, Red Transcare Care Ambulance
 Allstate Insurance Company Empire Blue Cross & Blue Shield Paul, Igor, Ph.D. Simpson, Claude Twenty First Century Legal Funding
 Allstate Insurance Company GEICO Premier Defense, LLC Simpson, Claude, Esq. US District Court - Southern District of New York
 Bandelero, Jasmine, R.N. Grant, Anthony Preska, Loretta A. SmartAdvocate, LLC White, Ashley
 Berenson, Conrad, Ph.D. Happy, Tomas RAGGEDY ANN AND ANDY LAW FIRM Smith, Anthony J. Zuckermann, Emil C., M.D.
 Beth Israel Mount Sinai Jack Martin Fund Clinic at Mount Sinai Robinson, Terry-Ann I. Smith, Tom


Other Person : Other Organization :

5. Click the 'Generate' or 'Generate in a new window' button in the lower left corner of the screen.

Other Person : Other Organization :

6. A Barcode Cover Sheet, similar to the following will be generated.

SmartAdvocate, LLC
 Powered by **SmartAdvocate**



Case : MD210411 - Rose, John
Case Type: Auto Accident
Case SubType: Rear End
Status: Pre-Lit 05 - PI Demand Pack Sent Out/Negotiation
From: Beth Israel Mount Sinai
To: SmartAdvocate, LLC
Category: Medical
Type: Records and Itemized Billing Statement
Staff: Paralegal: Grant, Anthony
 Primary Attorney: Dreier, Harry
 Legal Assistant: Delfel, Marina

START DESCRIPTION
 Mount Sinai - Hospital & Billing Records - Treatment Dates 1/1/23-1/15/23
 END DESCRIPTION
 + + + C#MD210411#21#81#52#2#41733#2# + + +
 + + + C#MD210411#21#81#52#2#41733#2# + + +
 SA0000032673_000007429_2

Generated By Delfel, Marina at 1:44 PM, Tuesday, February 14, 2023

7. Click the "Print" icon to print the Barcode Cover Sheet.

8. Place the printed Barcode Cover Sheet on top of the document you want to scan.

9. Repeat steps 1 through 8 for any additional documents you want to scan. Place the second, third, fourth, etc. set of documents on top of each other.

10. Place the document(s) with the generated Barcode Sheet(s) on top of each document in the document feeder of your scanner and scan the document(s). If you are scanning more than one document, they can be scanned all at once without the need to separate them individually. (The Barcode sheet for each document will act as a separator).

11. SmartAdvocate® will automatically separate the individual documents (if you had scanned more than one document at a time) and route them to their appropriate file, place them in the correct folder, under the correct document type and sub-type, and give them the correct name.

12. The scanned document(s) will be listed in the Document section of the respective file(s), with an Origin of 'Scanned'.

| CREATE DOCUMENT | | ATTACH DOCUMENT(S) | | CLEAR FILTER | | Preview: | | Documents | | | |
|--------------------------|---|--------------------|--|--------------|--------|----------|--------------------------|--------------------|--------------------------------|--------------------|--|
| Icon | Description | Category | Sub-Category | Origin | Folder | Tags | Review | Date | From | To | |
| <input type="checkbox"/> | Vehicle Damage Report | Medical | Records | Scanned | | | <input type="checkbox"/> | 8/10/2022 3:46 PM | Conference, Room A | Conference, Room A | |
| <input type="checkbox"/> | GA-Medical_Authorization | Medical | Records | Scanned | | | <input type="checkbox"/> | 8/10/2022 3:46 PM | Conference, Room A | Conference, Room A | |
| <input type="checkbox"/> | GA-Authorization to Release Personnel Records | Medical | Records | Scanned | | | <input type="checkbox"/> | 8/10/2022 3:46 PM | Conference, Room A | Conference, Room A | |
| <input type="checkbox"/> | Medical Records - Saint Anthony | Medical | Records and Itemized Billing Statement | Attached | | | <input type="checkbox"/> | 8/10/2022 10:25 AM | Saint Anthony Central Hospital | SmartAdvoca LLC | |

Create Funding Request

The 'Funding' button allows you to create a case funding application on behalf of your client. The "Funding" referred to in connection with this button is client funding; money borrowed by the plaintiff, either pre-settlement or post-settlement, in anticipation of receiving funds as a result of the case.

Using the Funding Icon

1. Click the 'Funding' button. The Add Funding Request panel will open.

1. Funding Requests Table: Contains the plaintiff funding requests details and allows various actions to be performed on them. See Funding Requests Table.

Funding

The Funding page allows you to view and record the details of case funding. The "Funding" referred to on this page is case funding; money borrowed by your firm to finance the expenses of the litigation.

The Structure of This Page

? Unknown Attachment

1. Add Case Funding button. Used to add new case funding to the case file. See [Adding Case Funding](#).
2. Case Funding table. Contains the case funding details and allows various actions to be performed on them. See [Case Funding Table](#).

Case Funding Table

The Case Funding table is where the details of case funding are stored. Each row of the table represents an individual funding company. See [Tables](#) for general information about table structure and usage, including all buttons and other tools in this table that are not mentioned below.

Columns in the Table

The Case Funding table contains the following available columns:

? Unknown Attachment

1. Funded By: The company funding the case.
2. Need to Pay Back: The amount owed to the funding company after the conclusion of the case.
3. Comment: Any comments about the funding.
4. [column with no title]: [Right-click icon](#); right-click menu contains Edit and Delete.

Editing Case Funding

To edit case funding:

1. Click the [right-click icon](#) in the untitled column of the row representing the funding you wish to edit, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Edit option in the menu. This will bring up an Add/Edit panel for case funding, with the existing information filled in.
3. Fill the fields in with your desired information. See [The Add/Edit Case Funding Panel](#) for details about the fields.
4. Click Save to save the changes and close the panel.
 - If you decide you do not wish to save the changes, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

Deleting Case Funding

To delete case funding:

1. Click the [right-click icon](#) in the untitled column of the row representing the funding you wish to delete, or right-click anywhere in that row. This will bring up a menu of options.
2. Click the Delete option in the menu. This will bring up a confirmation message (to avoid accidental deletions).
3. Click the OK button in the message to confirm the deletion.
 - If you decide you do not wish to delete the funding, click Cancel instead of clicking OK to cancel the deletion. You can also click the black X at the upper right of the message to do the same thing.
 - Until you either confirm or cancel the deletion, you may not be able to visit any other tab in your browser.

Adding Case Funding

To add new case funding:

1. Click the Add Case Funding button. This will bring up an Add/Edit panel for case funding, completely blank.
2. Fill the fields in with your desired information. See [The Add/Edit Case Funding Panel](#) for details about the fields.
3. Click Save to save the funding and close the panel.
 - If you decide you do not wish to save the funding, click Cancel instead of clicking Save to undo the changes and close the panel. You can also click the white X at the upper right of the panel to do the same thing.

The Add/Edit Case Funding Panel

The Add/Edit Case Funding Panel allows you to fill in the details of case funding. See Add/Edit Panels for general information about panel structure and usage. This panel contains the following fields:

? Unknown Attachment

1. Funded By: The company funding the case.
2. Need to Pay Back: Whether the amount owed to the funding company is calculated as a portion of the net firm fee or as an absolute amount.
3. % of the Net Firm Fee: The portion of the net firm fee owed to the funding company after the conclusion of the case. This field is uneditable and ignored unless % of the Net Firm Fee is selected in the Need to Pay Back field.
4. Amount: The amount owed to the funding company after the conclusion of the case. This field is uneditable and ignored unless Amount is selected in the Need to Pay Back field.
5. Comment: Any comments about the funding.

Templates

The 'Template' button allows quick access to create a document in a case using an existing Template in SmartAdvocate.

Using the Template Icon

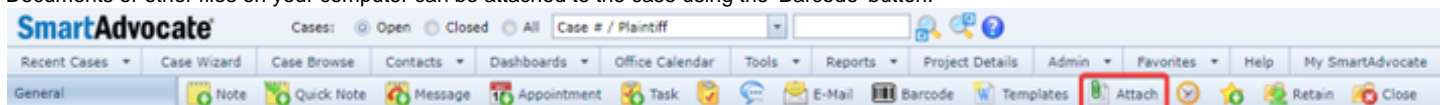
1. Click the 'Template' button.



1. See Document Templates for details on creating case documents from templates.

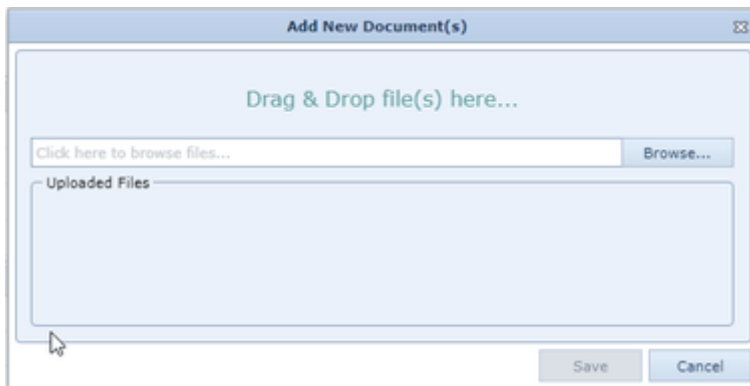
Attach

Documents or other files on your computer can be attached to the case using the 'Barcode' button.

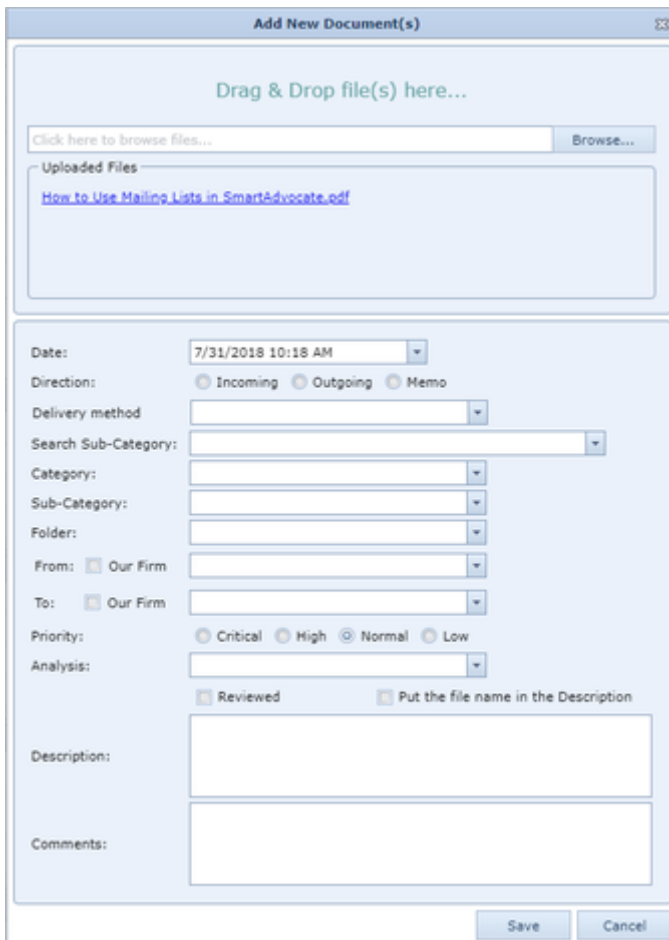


Using the Attach Icon

1. Click the 'Attach' button. An 'Add New Document(s)' panel will open.



1. Click on the Browse button and locate the document or file you wish to attach to the case. Note that the Browse function is operated by Windows and thus may vary depending upon the version of Windows installed on your computer. Once the file has been chosen, click on the Open or OK button. Multiple files may be selected simultaneously using this method, however all such files must have the same properties.
2. The file(s) will be uploaded to the case and an expanded 'Add New Document(s)' panel will open. The panel will list under 'Uploaded Files' the names of the file(s) to be attached to the case.



1. Choose the appropriate properties for the file(s) and click on 'Save'.

1. The attached files will be listed in the Document section of the case, with an Origin of 'Attached'.

| Documents | | | | | | | | | | |
|-----------|--|-----------|-----------|-----------------------|--------------------|--------------------|-----------|--------------------|-----------|--|
| Icon | Description | Folder | Category | Sub-Category | Date | From | Direction | To | Origin | |
| | Retainer Agreement - Sakiant | No Folder | Retainer | Retainer Agreement[Ec | 7/26/2018 12:01 PM | SmartAdvocate, LLC | Outgoing | | Generated | |
| | Letters - Case Opening - Automobile Case - SA | No Folder | Plaintiff | Letter | 7/25/2018 3:29 PM | SmartAdvocate, LLC | Outgoing | | Generated | |
| | (PDF version of) Letters - Case Opening - Automobile Case - SA | No Folder | Plaintiff | Letter | 7/25/2018 3:19 PM | SmartAdvocate, LLC | Outgoing | SIMPSON, CLAUDE R. | Attached | |

Start/Stop Timer

Using the Start/Stop Timer button for Time Tracking

The Timer icon starts a timer for time tracking.



Click on the timer icon to start the timer. When the timer is running, click on the timer icon to end the timer.

When you end the timer, the Edit Time Tracking panel opens. See Time Tracking for details about adding and editing time tracking details.

Retain

The Retain Case button is used to mark a case retained, and to automatically perform a set of actions related to retaining the case. It can only be used if there is no retainer recorded in the case; entering a retainer automatically makes the case as retained and the Retain button will be greyed out and unusable.

Using The Retain Button

To use the Retain Case button to mark a case retained:

1. Click the button. A panel will appear for selecting the date the case was retained, with the current date selected by default.
2. If you wish to change the retainer date, do so; if you do not, do not. Click the Ok button.

What The Retain Button Does

Once you have used the button, several actions will occur. In no particular order:

- If you have created any [Retainer Staff](#) rules that apply to the case type, they will be applied. All staff previously assigned to the case will be removed, and the staff included in the Retainer Staff rules will be added.
- A Note will be added to the case indicating that the case was retained; you (the staff member who used the button) will be listed as the creator of that Note.
- A retainer will be added in the [Retainer Table](#) on the [Retainer/Referral](#) page, with the primary plaintiff listed in the Plaintiff Name column and the selected date listed as the Received date in the Retainer column.
 - This will also cause the selected date to be listed as the Retainer Date on the [Case Summary](#) page, and cause the Retain button to be greyed out; these side effects are due to the addition of the retainer in the Retainer/Referral page, and would also have occurred if you had simply added the retainer manually instead of clicking the Retain button.
- The status of the case will change. Which status a newly retained case changes to is set in the System Parameters page under Admin. This setting can be found under the Group Description of 'Retainer' and Parameter Description of 'Retainer Button Status Changes'.

How to Use the 'Retain' Button in SmartAdvocate

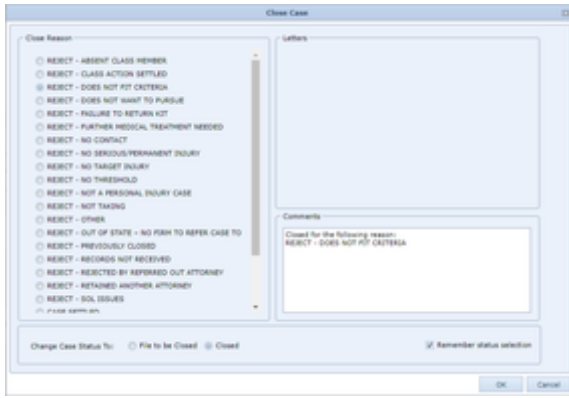
Close

The Close Case button is used to mark a case closed or soon to be closed, and to automatically perform a set of actions related to closing the case. It can only be used if the case is not currently in the Closed status; otherwise, the button will be greyed out and unusable.

Using The Close Button

To use the Close Case button to mark a case closed or soon to be closed:

1. Click the button. A panel will appear with four fields: Close Reason, Letters, Comments, and Change Case Status To. (The field for Letters will not initially be visible.)
2. Select the reason you are closing the case from the Radio button list in the Close Reason field. (See the [Case Close Reasons](#) picklist to edit the contents of the list.) This will cause the Comments field to be set to "Closed for the following reason:" followed by the name of the reason on the next line. It may also cause a Radio button list to appear in the Letters field. That list consists of every non-archived document template whose name contains the text in the Document keywords column of the selected reason in the Case Close Reasons picklist. If there is only one template in the list, the corresponding radio button will automatically be selected; otherwise, none of the options will be selected by default.
3. If there is more than one option in the Letters field, then if you wish, you may select a document to generate. This is generally used to generate the reject letter that accompanies the case closure.
4. If you wish, you may change the contents of the Comments field.
5. Depending on whether the case is soon to be closed or actually closed, select the appropriate option from the Change Case Status To field.
6. Click OK.



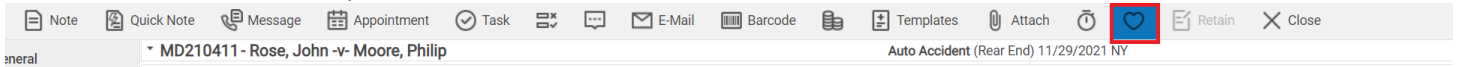
What This Button Does

Once you have used the button, several actions will occur. In no particular order:

- The status of the case will change to whichever status you selected in the Change Case Status To field. The comment field of the status will be set to the contents of the Comments field. If you selected Closed, the reason you selected in the Close Reason field will also be in the Close Reason field of the new status.
 - Additionally, if you selected Closed, the case closed date will be set to the current date, and the Close Case button will be greyed out; these side effects are due to the case status becoming Closed Case and would also have occurred if you had simply changed the case status to Closed Case manually instead of clicking the Close Case button. (The case closed date is equivalent to the status date of the current Closed Case status.)
- A note will be added to the case consisting of the contents of the Comments field; you (the staff member who used the button) will be listed as the creator of the note.
- If a document template was selected in the Letters field, you will automatically be redirected to the Document Generation page, and the Generate Document panel will be opened for the document you selected. You may then generate the document as usual (if you instead cancel the document generation, the status change and note will still occur).

Add to Favorites

The Favorites icon adds the case to your Favorites list.



Click on the Favorites icon to add the case to your Favorites list. See [Manage Favorites](#) for details about adding and managing your Favorites list.

Miscellaneous

Handling Contacts with Multiple Addresses

If you have an organization contact that is associated with multiple addresses, most likely a main office and a number of branches, and you wish to use one of the non-primary addresses of that contact for a particular case, you may encounter some difficulties. With the exception of plaintiffs, SmartAdvocate only uses the primary address of contacts for merge codes and table entries. This is because otherwise, you would need to select the correct address every time you selected a contact for a case or generated a document. There is a workaround that will allow you to specify the particular address to be used in a particular case, although it does require a few additional steps. The basic idea is that you create one main contact, then create as many additional contacts as you have secondary addresses. Link the secondary contacts to the main one, then for each case, add the main contact manually as a case contact whenever you add one of the secondary addresses.

Creating the Main Contact

First, create the primary contact. Click or hover the mouse over the Contacts tab in the top tool bar, then click Add Contact under that tab. This will bring up the Add New Contact panel. Click Organization to specify that the contact is an organization, then type in the name of the contact, appending "(Main Office)" or something similar to the end of the name to make it easier to see at first glance which office the contact connects to. Fill out all the other fields in the panel as usual, then click Save. (If you wish to add the secondary addresses to this contact for informational purposes, even though they will not be used by the system, click Save & Open Full Contact Card instead, then when the contact card comes up, click the Add New Address button in the Addresses section, fill in the address details, and click Save, repeating as many times as necessary to add all the addresses.)

Creating Branch Contacts

For each branch office, simply repeat the steps necessary to create the main contact, but add a parenthetical like "(Washington Office)" to each name to distinguish each branch from the others and from the main office.

Defining the Link Between the Main Contact and the Branch Contacts (Optional)

In order to specify how the main contact relates to the branch contacts, you may need to create a pair of new contact relationships. (This should only need to be done once.) Click or hover the mouse over the Admin tab in the top tool bar, then click Picklist Maintenance under that tab. This will bring up the Picklist Maintenance page. Find and click on Contact Relationships in the leftmost section of the page. Click the Add New Item button. This will bring up a small panel. Enter a name that describes the main contact relative to the branches, such as "Main Office," in the Relations field. Select Yes in the Is Work field if the addresses are linked through a corporate relationship (which they presumably are); otherwise, select No. Leave the Related To field blank for now. Click Update to save this part of the relationship.

Now click Add New Item again. Enter a name that describes the branch contacts relative to the main contact, such as "Branch Office," in the Relations field. Select the same thing in the Is Work field as you did for the previous item. In the Related To field, select the relationship you just created (i.e. Main Office or whatever you named it). This identifies the two relationships as inversely connected.

Finally, find the row of the table related to the first relationship you created (i.e. the row with Main Office, or whatever you chose, in the Relations column). Click the pencil icon in that row. This will bring the panel up again with the fields you entered still saved. Now, in the Related To field, select the second relationship you created. This will complete the two-way connection.

Linking the Main Contact to the Branch Contacts

Open up the contact card for the main contact. (If the contact card is not still open from before, you can either search for it using the quick contact search in the upper right of the screen or click Contacts List under the Contacts tab in the top tool bar and fill in the search fields.) In the contact card, click the Cases And Related Contacts tab. Next, click the Link/Add Related Contact button. Begin typing in the name of a branch contact in the Contact Name field, then when your contact is visible in the list, click that contact. In the Relationship to [Main Office name] field, find the relationship that describes the branch contact (i.e. Branch Office or whatever you named it) and select that. Click Save to add the relationship. This will automatically also add the main contact as "Main Office" (or whatever you named it) to the branch contact's contact card.

Now repeat the process to add each of the branch contacts as related contacts to the main contact's contact card. Once you have added them all, click the Save button at the bottom of the contact card. (This is actually not necessary to save contact relationships, but it is good practice anyway; the SmartAdvocate system will likely ask for confirmation if you try to leave the contact card without saving it.)

Adding the Correct Branch Contact to a Case

This step should be simple, if you have clearly distinguished the names of your branch contacts. You can add branch contacts to a case just like adding any contact to any case, and you should be easily able to tell which branch you are selecting because of the parenthetical in the name.

Adding the Main Contact to a Case with a Branch Contact (Optional)

This step will allow you to use the main contact's address in generated documents, if that happens to be necessary. Once you have added the branch contact to a case in the appropriate section of SmartAdvocate (e.g. Defendant Attorneys, Plaintiff Attorneys, etc.), click the Other tab in the left navigation pane (i.e. the leftmost area of individual case pages). Click All Contacts under the Other tab. This will bring up a list of all of the contacts associated with the case. Generally, these contacts are automatically added to this page by SmartAdvocate, but you can also manually add a contact through this screen. Click the Add New Contact button. Begin typing in the name of the main contact in the Contact field, then when the name is visible in the list, click that contact. In the role field, type in anything that will specify, to you, the contact's function in the case (if a branch contact is the defendant's law firm, you might type "Defendant Law Firm Main Office" in this field). If you wish to add a comment here, do so in the Comments field. Click Save to add the contact to the Case.

The newly added contact can now be included in generated documents using the set of merge codes for generic case contacts (those of the Contact type, which generally begin with "CONT-"). The branch contact will still be used for merge codes related to the contact's specific role in the case (e.g. DEF-ATTY-FIRM if the branch contact is the defendant's law firm).

Merge Codes

In order to make document templates flexible enough to be used for multiple cases, you need a way to automatically insert information from the case. SmartAdvocate provides you this power in the form of merge codes. A merge code is a unit of symbolic text that tells the SmartAdvocate system what piece of information should be inserted at that point in the document. When you generate a document for a specific case using a template that contains merge codes, SmartAdvocate reads those codes, finds the relevant information from that specific case, and makes the replacements for you. You will need the SmartAdvocate Word Plugin to take advantage of this feature for Word documents; a SmartAdvocate Excel Plugin is available for use in creating templates for Excel documents.

Generating Documents from Word or Excel Templates with Merge Codes

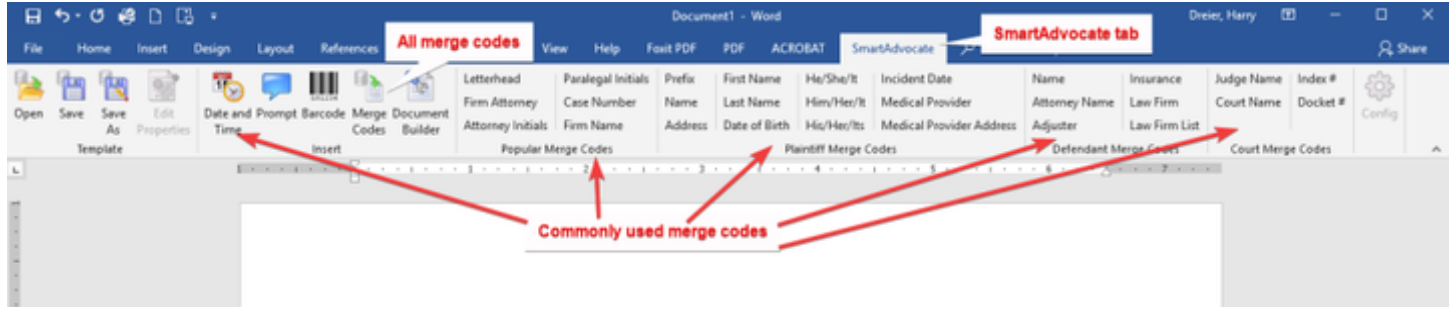
When the SmartAdvocate system generates a document with merge codes in it, it attempts to replace those merge codes with the appropriate information from the case in which the document is being generated. Some merge codes (e.g., the code for the case number) represent information that is unambiguous within a given case; there is only one possible replacement for that code. Other codes could have multiple possible replacements. For instance, a case might have multiple defendants, so if a template contained the merge code for the defendant's name, SmartAdvocate would not immediately know which defendant to replace the merge code with.

When you select a document to generate in the Create Documents screen for a particular case, a panel will open with, among other inputs, selection fields for any merge codes that the system cannot resolve on its own. These selection fields may be connected to each other. For example, if you have unresolved merge codes for the plaintiff's name and the plaintiff's address, they will both appear as selection fields in the panel. However, selecting the plaintiff will change the options available in the address field; only the addresses belonging to the selected plaintiff will be available. It is possible to use merge codes to insert one plaintiff's name and another plaintiff's address, if you need to do so; see Advanced Techniques for Using Merge Codes, below.

Once you have made your selections, the document will be generated, saved in the Documents section of that case, and opened in Word or Excel, as appropriate. If you have included any merge codes that require post-generation action (see Advanced Techniques for Using Merge Codes, below), Word or Excel will prompt you to take whatever actions are necessary to resolve the remaining merge codes. Once you have done so, save the document to make the code replacements permanent (otherwise, only the selections that happened before the document was generated will be saved).

Creating New Word or Excel Templates with Merge Codes

If you wish to create a new template, it is recommended that you start with an existing fully-formed example of the type of document you want to utilize to build a template. Click the SmartAdvocate tab in the top tool bar in Word or Excel to open the merge code and template options.



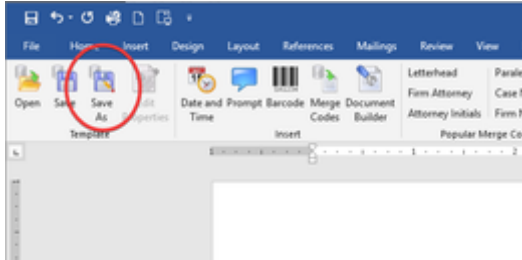
For each piece of text in the document that contains information that would be part of the SmartAdvocate case file, perform the following steps:

- Highlight (select) the text.
- Look through the merge codes visible in the top tool bar (commonly used merge codes) to see if one of them represents the information in the selected text. (For example, if the text is the full name of the plaintiff in the case, you would be looking for the "Name" code in the Plaintiff Merge Codes section of the top tool bar.)
- If you did not find the merge code in the top tool bar, click Merge Codes in the Insert section of the top tool bar. This will bring up a list of all the merge codes in the system.
- Find the merge code that represents the information in the selected text. To make it easier to find your merge code, you can try choosing the code type from the dropdown above the list and/or use the filter row at the top of the list to narrow down the visible codes. When you have found it, click Insert Selected Merge Code and Hide Dialog to replace the text with the code and close the list.

For any information that would not necessarily be part of the SmartAdvocate case file, but which might vary between different documents created from that template (e.g. the type of document being served in a template of an affidavit of service), you can use a post-generation prompt. Click the Prompt icon in the Insert section of the top tool bar to create a prompt, then replace "Message Text" with a description of the information you want to insert at that point. After the document is generated, Word or Excel will prompt you with the description you used and a text input field that you will fill in with the text you wish to insert at that point. (You can also replace "Default Value" with any text you want to be in the input field by default; if you choose not to, the input field will simply be blank by default.)

You can also include the current date and/or time by selecting Date and Time from the Insert section of the top tool bar. Doing so will bring up a list of possible formats to insert. Select the one you wish to include in the template, then click Insert Selected Date. Click the red X in the upper right corner of the list to close it.

When you have made all the text substitutions you need, click *Save As in the Template* section of the top tool bar.



(NOTE: Only use the Save As button within the SmartAdvocate tab to save a template. Using the standard Save button in Word will save what you are working on as a document in Word, rather than a template in SmartAdvocate.)

This will bring up a panel where you can name the template and select its category and subcategory. You can also put it in a template group, but since template groups already automatically include templates based on their names, this is generally unnecessary unless you want to put the template in a group other than the ones its name would already put it in. See the [Document Templates](#) administrative page for details. There is also a checkbox you can select which will mark the template as archived, but all that does is make the template unavailable for use in generating documents, so you probably should avoid doing so when initially creating a template. Once you click Save As in the panel, the template will be saved in the SmartAdvocate system and (if it is not archived) can be used to generate documents for any case.

Styling Merge Code Text

If you want to control the way the text that replaces a merge code in a generated document looks, simply format the merge code itself to the way you wish the text be formatted. If you want it to be italicized, or a larger size, or a different color, make those changes to the merge code and the replacement text will have the same changes. You cannot cause only part of the replacement text to have some format; the entire replacement text will always have the same format. (Two different pieces of text that are the result of two different merge codes can be formatted differently.) In particular, if you want the replacement text to appear in all capitals, select the merge code, open the Font panel in Word or Excel, then select "All caps" from the Effects section.

Advanced Techniques for Using Merge Codes

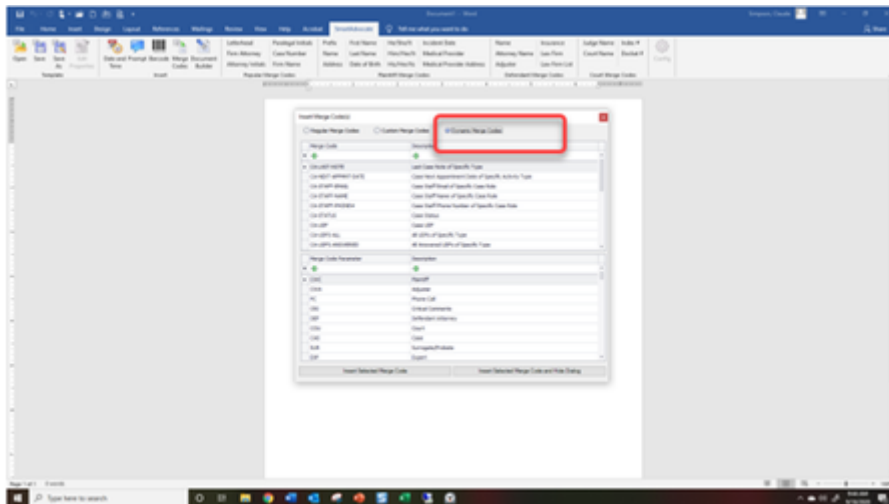
There are several additional tools that merge codes offer that are available through the use of suffixes. A merge code suffix is text, enclosed in angle brackets (< >), appended to the main merge code, within the square brackets ([]), with a comma. For example, <! [PL-AGE,<Youngest Plaintiff>] !> would be a merge code with a suffix, and <Youngest Plaintiff> would be the suffix. Suffixes can serve a number of purposes. Suffixes have no effect if the merge code represents unambiguous information; the merge code is replaced during document generation without any prompts. However, if the merge code with a suffix represents information that might be ambiguous, it is not replaced at the time the document is generated; instead, it either triggers a prompt in Word or Excel that asks the user to select the appropriate option once the document is generated, or it is automatically replaced after the document is generated based on similar selections earlier in the document. There are four main types of suffixes:

- **An asterisk suffix.** This is any suffix where the first character after the opening angle bracket is an asterisk, such as <*Example>. Merge codes with an asterisk suffix always trigger a prompt, the title of which is whatever text follows the asterisk (possibly none). You can either type in an asterisk suffix manually, or, if you are selecting the merge code from the full list, you can select the Force User Input option below the list and write the title of the prompt (if any) in the Question field.
- **A hash suffix.** This is any suffix where the first character after the opening angle bracket is a hash symbol, such as <#Example>. Merge codes with a hash suffix always trigger a prompt, the title of which is whatever text follows the hash symbol (possibly none). Additionally, merge codes with a hash suffix allow the user to select multiple options and gives the user a choice as to the text that will separate them (e.g. a comma and space, or a new line) when they are substituted in for the merge code. You can either type in a hash suffix manually, or, if you are selecting the merge code from the full list, you can select the Multiple Select option below the list and write the title of the prompt (if any) that will appear in the Question field.
- **A standard suffix.** This is any suffix where the first non-space character after the opening angle bracket is neither an asterisk nor a hash symbol, such as <Example>. Merge codes with a standard suffix only trigger a prompt if there has not already been a merge code with the same suffix, requiring the same selection, earlier in the document. For example, if the first two merge codes in a document are <! [PL-FIRST-NAME, <Lead Plaintiff]>] !> and

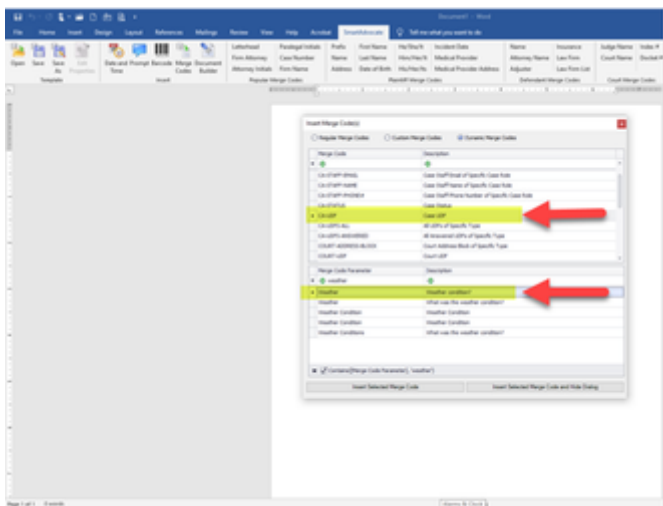
Create and Use UDF Merge Codes

1. First create the UDF using UDF Editor and give the UDF a "Short Name" (The Short Name will become the UDF Merge Code)

2. When creating your template, select "Dynamic Merge Code" to choose the UDF merge Code
3. Choose the type of UDF from the list on the top section of the list of Dynamic Merge Codes (e.g., Case UDF, etc.)



4. You will see your UDF Merge Code that was created in Step 1 above.



5. From here the UDF Merge code is inserted in your template the same way as any 'regular' merge code.

The Funding Button in SmartAdvocate

How To Use The SmartAdvocate App

How To Use The SmartAdvocate App -10-23-20

Medical Provider - Bills Finalized and Don't Pay at Settlement Options

How to associate a note with a party or contact in the case

Use the 'Merged Facts' Field to Populate Your Pleadings

Case Wizard

In order to create a new case in SmartAdvocate, you *must* use the Case Wizard.

Note: (Cases can be entered in SmartAdvocate in other ways, such as through integrations with third party providers, however Case Wizard is the only method of entering cases from within SmartAdvocate.)

The Case Wizard allows you to enter the basic information about a new case (in particular, the information you would likely record during intake), and automatically formats that information into a new case file. You can access the Case Wizard by clicking the Case Wizard heading in the top tool bar, which will open the Case Wizard in a new tab.

Take note that if your firm has multiple offices, when entering a new case through Case Wizard the case will be assigned to the office with which the person who entered the case is associated.



The Case Wizard is divided into five or more sections. Your firm can select which sections appear in Case Wizard for each case type. The tabs at the top of the page can be used to jump to the different sections of the page. The available tabs are **Plaintiff, Add Plaintiff, Defendant, Add Defendant, Medical Providers, Insurance, Vehicles, Employment, Incident/Injury, Source, and Finish**.

To learn how to Create a New Case and learn more about each of the six tabs, click [here](#).

SmartAdvocate Tips of the Week: New Cases and the Case Wizard

[How To Automatically Assign Staff To Your New Cases](#)

[How To Automatically Enter The Default Defendant In Your New Cases](#)

Creating a New Case

To create a new case:

1. Open the Case Wizard.

2. Select the case group, case type and subtype, and fill in the details of the first plaintiff.
3. If there are multiple plaintiffs in the case, click the Add Plaintiff tab and fill in the details of the second plaintiff; otherwise, skip this step.
 - If there are three or more plaintiffs, click the new Add Plaintiff tab after you have filled in the second plaintiff's details, and fill in the details of the third plaintiff.
 - You can only add up to three plaintiffs through the Case Wizard; if you need to add more, use the Plaintiff Summary case page after the case has been created.
4. If you know the identity of the non-default defendant, click the Defendant tab and fill in the details of the defendant.
5. If your firm has the tabs activated for Medical Providers, Insurance, Vehicles, and Employment, click on each tab and fill in the details of each tab.
6. Click the Incident/Injury tab and fill in the details of the incident.
7. Click the Source tab and fill in the details of how the plaintiff was referred to your firm.
8. Click the Finish Wizard. Determine whether the case will be rejected, retained or reviewed.
 - a. If the case will be rejected, select Reject. Use the dropdown to indicate the reason for rejection. Then select the document, email and/or text template that will be sent to the Plaintiff. Click Generate & Reject.
 - b. If this case will be retained, select Retain. Choose the Document or E-Sign template that will be sent to the Plaintiff. Click Generate & Retain.
 - c. If this case needs to be reviewed, select Review. Then click Generate & Review.
9. If you have filled out all of the required information, the Case Wizard will close and the [Case Summary](#) page for the new case will open. If not, the tab will list the sections of the Case Wizard and whether each has been adequately filled out. See [Finish Wizard and Generate Case](#) for a description of the necessary information from each of the other tabs. This chapter will not list whether each individual field is required, because the Case Wizard works differently from Add/Edit panels.

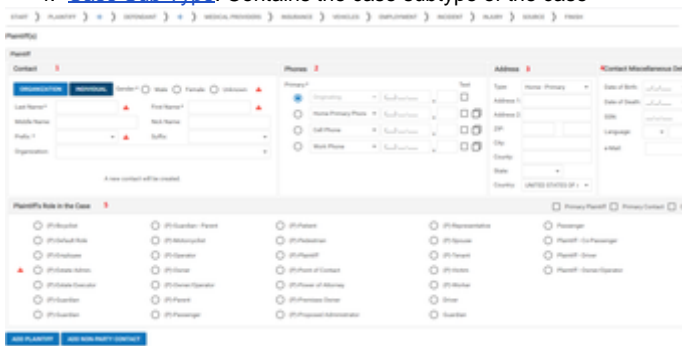
Plaintiff

The Plaintiff tab is where you enter the personal information of the first plaintiff and the case's type and subtype.

The Structure of This Tab



1. [Type Shortcuts](#). Links for commonly used case types and subtypes, allowing you to quickly select the appropriate ones. If the ones you want are not in the list, choose the correct ones from the lists below.
2. [Case Group](#). Contains the case group of the case.
3. [Case Type](#). Contains the case type of the case.
4. [Case Sub Type](#). Contains the case subtype of the case.



1. [Contact](#). Contains the plaintiff's name and some other identifying details.
2. [Phones](#). Contains the plaintiff's phone numbers.
3. [Address](#). Contains the plaintiff's physical address.
4. [Contact Miscellaneous Details](#). Contains other personal information about the plaintiff.
5. [Plaintiff's Role in the Case](#). Contains the plaintiff's case role.

Contact

The Contact area contains the following fields:

| Plaintiff | | Plaintiff | |
|--|----------------|------------------------------------|--|
| Contact | | Contact | |
| <input type="radio"/> ORGANIZATION <input checked="" type="radio"/> INDIVIDUAL | | <input type="radio"/> ORGANIZATION | |
| Gender:* <input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unknown | | Name*: 10 | |
| Last Name:* 3 | First Name:* 4 | Other Name: | |
| Middle Name: 5 | Nick Name: 6 | | |
| Prefix: * 7 | Suffix: 8 | | |

Organization: 9

Office Hours:

A new contact will be created.

1. [Category]: Radio label; indicates whether the plaintiff is an organization or an individual.
2. Gender: Radio button; the gender of the plaintiff. This field does not appear unless [Category] is set to Individual.
3. Last Name: Text input; the last name of the plaintiff. This field does not appear unless [Category] is set to Individual.
4. First Name: Text input; the first name of the plaintiff. This field does not appear unless [Category] is set to Individual.
5. Middle Name: Text input; the middle name of the plaintiff. This field does not appear unless [Category] is set to Individual.
6. Nick Name: Text input; the nick name of the plaintiff. This field does not appear unless [Category] is set to Individual.
7. Prefix: Dropdown; the title that precedes the plaintiff's given name (e.g. Dr.). See Prefixes for the contents of the dropdown. This field does not appear unless [Category] is set to Individual.
8. Suffix: Dropdown; the title that follows the plaintiff's given name (e.g. Jr.). See Suffixes for the contents of the dropdown. This field does not appear unless [Category] is set to Individual.
9. Organization: Contact-list dropdown; the organization that employs the plaintiff. This field does not appear unless [Category] is set to Individual.
10. Name: Text input; the full name of the plaintiff. This field does not appear unless [Category] is set to Organization.
11. Other Name: Text input; an alternate name for the plaintiff. This field does not appear unless [Category] is set to Organization.
12. Office Hours: Text input; the hours of operation of the plaintiff organization. This field does not appear unless [Category] is set to Organization.
13. EIN #: Text input; the Employer Identification Number of the plaintiff organization. This field does not appear unless [Category] is set to Organization.
14. Code: Text input; the Employer Code of the plaintiff organization. This field does not appear unless [Category] is set to Organization.

Phones

The Phones area allows you to record up to four phone numbers for the plaintiff. Most of the fields in this area, accordingly, appear four times. However, the first phone number is specifically for recording the phone number from which a plaintiff's initial call originates, before you know exactly what type of phone number it is. Accordingly, the other three phone numbers each have a [Copy icon](#) to the right of the fields that comprise that number. Clicking the icon copies the number and extension from the Originating phone number to the one associated with the clicked icon. The Text checkbox is not copied. The area contains the following fields:

1. Primary: Radio button; which of the plaintiff's phone numbers is the primary phone number. There can only be one primary phone number. Clicking on the radio button will automatically deselect the radio button that may have been selected for any other phone number.
2. [Phone Type]: Dropdown; the type of the phone number. this field appears four times, once for each type of phone number. The first of these fields contains Originating and cannot be changed.
3. [Phone Number]: Text input; the phone number. This field appears four times, once for each phone number.
4. [Extension]: Text input; the extension to the phone number. This field appears four times, once for each phone number.
5. Text: Checkbox; whether the phone number can receive text messages. This field appears four times, once for each phone number.

Address

The Address area contains the following fields:

| Address | |
|------------|----------|
| Type: | 1 |
| Address 1: | 2 |
| Address 2: | 3 |
| ZIP: | 4 5 |
| City: | 6 |
| County: | 7 |
| State: | 8 |

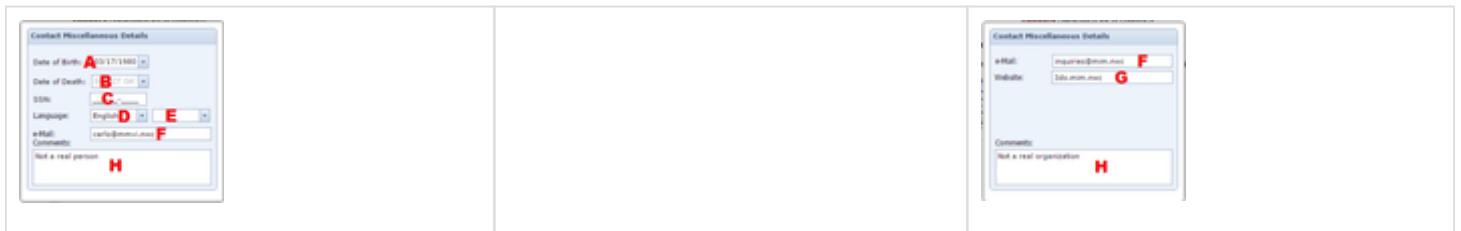
State:

Country: **9** UNITED STATES OF A

1. Address Type: Dropdown; The type of the address. See Address Types picklist for contents of the dropdown.
2. Address 1: Text input; The first line of the address.
3. Address 2: Text input; The second line of the address.
4. ZIP: Text input; The five-digit ZIP code (or the Canadian postal code). Entering a partial ZIP code, or a ZIP code associated with multiple cities, brings up a panel allowing you to select the correct ZIP code; the selection will also enter the city, county, and state automatically.
5. ZIP [Extended]: Text input; The last four digits of the extended ZIP code.
6. City: Text input; The city in which the address is located. This will be automatically inserted based upon the ZIP code entered. If the ZIP code entered covers more than one city, a list will appear from which the appropriate city can be chosen.
7. County: Text input; The County in which the address is located. This will be automatically inserted based upon the ZIP code entered.
8. State: Dropdown; The postal abbreviation for the state (or province) in which the address is located. This will be automatically inserted based upon the ZIP code entered.
9. Country: Dropdown; The country in which the address is located.

Contact Miscellaneous Details

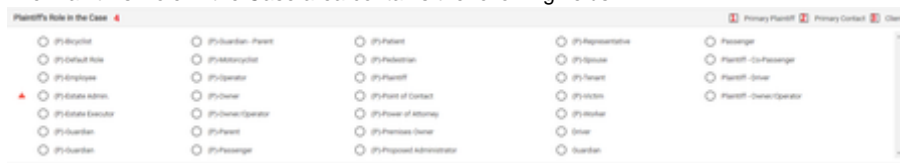
The Contact Miscellaneous Details area contains the following fields:



1. Date of Birth: Date-widget dropdown; The plaintiff's date of birth. This field does not appear unless [Category] is set to Individual.
2. Date of Death: Date-widget dropdown; The plaintiff's date of death. This field does not appear unless [Category] is set to Individual.
3. SSN: Text input; the plaintiff's Social Security Number. This field does not appear unless [Category] is set to Individual.
4. Language [Primary]: Dropdown; The plaintiff's primary language. This field does not appear unless [Category] is set to Individual.
5. Language [Secondary]: Dropdown; the plaintiff's secondary language. This field does not appear unless [Category] is set to Individual.
6. e-Mail: Text input; the plaintiff's email address.
7. Website: Text input; The plaintiff's website. This field does not appear unless [Category] is set to Organization.
8. Comments: Text input; any comments about the plaintiff.

Plaintiff's Role in the Case

The Plaintiff's Role in the Case area contains the following fields:



1. Primary Plaintiff: Checkbox; whether this plaintiff is the primary plaintiff.
2. Primary Contact: Checkbox; whether this plaintiff is the primary contact in this case.
3. Client: Checkbox; whether this plaintiff is a client of your firm.
4. [Plaintiff Role]: Radio button; plaintiff's role in the inciting incident of the case. The specific roles displayed in this panel are based on the case type chosen. The roles for each case type are configurable by the administrator.

Type Shortcuts

[03 - Bankruptcy Case 11] [Abilify - Medical Malpractice] [Actos - Death] [Auto - Municipal] **1** Type/Sub Type Search: **2**

| Case Group | Case Type | Case Sub Type |
|----------------|---------------|--|
| Auto Accidents | Auto Accident | <input type="checkbox"/> A - Medicaid <input type="checkbox"/> A - Medicare |

Facts:

The Type Shortcuts area is used to efficiently select the case group, type, and subtype of the case; there is no separate information that is stored in this area. The area has two parts.

1. A selection of hyperlinks, each containing the name of a recently used case type. Clicking any of these hyperlinks will automatically select the case type, and the case group it is in, in the Case Group and Case Type areas. Note that it will still be necessary to choose the case subtype manually.

2. A [Dropdown](#) field containing a two-column table. The table contains every case type-case subtype pair in the SmartAdvocate system. To search for a particular case type or case subtype, click the text input area in the field and type in any part of the name of the desired case type or subtype. The table will automatically be filtered to only include entries where either the type or subtype contains the text you entered. Selecting any item will automatically select the listed case type and subtype, and the case group the case type is in, in the Case Group, Case Type, and Case Sub Type areas.

Case Group

The Case Group area contains only one field:

Case Group: List; The case group of the case. Chose the appropriate group from the Case Groups picklist. Case Groups are configurable by the administrator.

Case Type

The Case Type area contains only one field:

Case Type: List; The case type of the case. Chose the appropriate group from the Case Type picklist. Case Types are configurable by the administrator.

Case Sub Type

The Case Sub Type area contains only one field:

Case Sub Type: List; The case subtype of the case. Chose the appropriate group from the Case Subtype picklist. Case subtypes are configurable by the administrator.

Add Plaintiff

The Add Plaintiff tab is where you enter the personal information of an additional plaintiff. If you begin to enter the information for the second plaintiff (i.e. the first additional plaintiff), a new Add Plaintiff tab will appear, allowing you to add a third plaintiff. This only happens once; the maximum total number of plaintiffs that can be included in a case using the Case Wizard is three. If you need to add more, use the Plaintiff Summary case page after the case has been created.

This tab contains five areas: Contact, Phones, Address, Contact Miscellaneous Details, and Plaintiff's Role in the Case. Each of these areas functions identically to its corresponding area in the Plaintiff tab, with one exception: the Address area contains the hypertext Copy From First, which automatically copies the address in the Plaintiff tab to the address in the Add Plaintiff tab. Note that the list of available roles in the Plaintiff's Role in the Case area is also based on the selected case type from the Plaintiff tab.

Defendant

The Defendant tab is where you enter the personal information of the defendant. This tab contains five areas: Contact, Phones, Address, Contact Miscellaneous Details, and Defendant's Role in Case. The Contact, Phones, Address, and Contact Miscellaneous Details areas function identically to their corresponding areas in the Plaintiff tab. The Defendant's Role in Case area contains only one field:

[Defendant Role]: Radio button; the defendant's role in the inciting incident of the case. You can choose between each defendant role assigned to the selected case type. The specific roles displayed in this panel are based on the case type chosen. The roles for each case type are configurable by the administrator.

Medical Providers

The Medical Providers tab is where you enter the details about medical providers the plaintiff has seen for the injuries or symptoms resulting from the incident.

The Structure of This Tab

1. Add: Click here first to open the dialog box to add the medical provider.
2. Plaintiff: Contact-list dropdown; the plaintiff that treated with the medical provider.
3. Provider: Contact-list dropdown; the medical provider treated the plaintiff.
4. Individual: Contact-list dropdown; the specific **individual** (perhaps at a medical office or hospital) who treated the plaintiff.
5. Start Date: Date-widget dropdown; the first date of treatment with this medical provider.
6. End Date: Date-widget dropdown; the last date of treatment with this medical provider.
7. Total Visits: This field is to indicate the total number of treatment visits the plaintiff had with this medical provider. Enter a number.
8. Comments: Enter any applicable comments regarding this medical provider
9. Update: Once all the information for this medical provider is entered, click Update to save the information.

Insurance

The Incident/Injury tab is where you enter the details of the inciting incident of the case, and any injuries to any plaintiff resulting from the incident. Most aspects of this tab vary depending on the case type selected in the Plaintiff tab.

The Structure of This Tab

1. Add: Click here first to open the dialog box to add the insurance carrier.
2. Party: Dropdown; the party the insurance carrier insures.
3. Party Type: Dropdown; whether the party is plaintiff or defendant
4. Insurance Company: Contact-list dropdown; the insurance company
5. Primary: Checkbox; indicates this is primary insurance,
6. Insurance Type: Dropdown; indicates type of insurance policy this party.
7. Name of the Insured: Contact-list dropdown; the insured person or company.
8. Policy Number: Text field. Enter the policy number of the insurance policy.
9. Claim Number: Text field. Enter the claim number.
10. Group Number: Text field. Enter the Group Number if the insurance policy, if one applies. For example, health insurance policies have group numbers.
11. ID Number: Text field, Enter the ID Number if the insurance policy, if one applies. For example, health insurance policies have ID numbers.
12. Policy Start Date: Date-widget dropdown; the start date of the insurance policy.
13. Policy End Date: Date-widget dropdown; the end date of the insurance policy.
14. Policy Limits: Text field. Enter the liability policy limit per person injured.
15. Policy Limits: Text field. Enter the liability policy limit per incident.
16. Deductible: Enter the deductible for the liability policy.
17. UM/SUM Policy Limits: Text field. Enter the UM/SUM policy limit per person injured.
18. UM/SUM Policy Limits: Text field. Enter the UM/SUM policy limit per incident.
19. UM/SUM Deductible: Enter the deductible for the UM/SUM policy.
20. Comments: Text field. Enter any applicable comments regarding this insurance policy.
21. Update: After all the insurance information has been entered for this policy, click Update to save the information.

Vehicles

The Vehicles tab is where you enter the details of the vehicles involved in the incident.

The Structure of This Tab

1. Add: Click here first to open the dialog box to add the vehicle information.
2. Party: Dropdown; the party applicable for this vehicle.
3. Party Type: Dropdown; whether this party is a plaintiff or a defendant.
4. Owner: Contact-list dropdown; owner of the vehicle.
5. Registrant: Contact-list dropdown; registrant of the vehicle.
6. Operator: Contact-list dropdown; operator of the vehicle.
7. License #: Text field. Enter the license number of the operator of the vehicle.
8. License State: Dropdown; the state where the operator of the vehicle is licensed.
9. License Expiration: Date-widget dropdown; the expiration date of the operator's license.
10. Restrictions: Text field. Enter any restrictions applicable to the operator's license.
11. Make: Dropdown; the make of the vehicle.
12. Model: Dropdown; the model of the vehicle.
13. Body: Dropdown; the body type of the vehicle.
14. Year: Text field. Enter the year of the vehicle.
15. Color: Text field. Enter the color of the vehicle.
16. Plate Number: Text field. Enter the plate number of the vehicle.
17. Plate Type: Dropdown; the plate type of the vehicle.
18. Vehicle State: Dropdown; the state who issued the vehicle plate.
19. VIN: Text field. Enter the VIN number of the vehicle.
20. Registration Expiration: Date-widget dropdown; the expiration date of the vehicle plate.
21. Lease: Dropdown; indicate if the vehicle is leased.
22. Comments: Enter any comments applicable to the vehicle.
23. Update: Once all the vehicle information has been entered, click update to save the information.

Employment

The Employment tab is where you enter the employment and compensation details of the plaintiff.

The Structure of This Tab

1. Add: Add: Click here first to open the dialog box to add the plaintiff employment information.
2. Plaintiff: Dropdown; plaintiff who is employed
3. Employer Name: Contact-list dropdown; the employer
4. Date From: Date-widgit dropdown; the date the plaintiff began this employment.
5. Date To: Date-widgit dropdown; the date the plaintiff ended this employment.
6. Status: Dropdown; the status of the plaintiff's employment.
7. Work site: Contact-list dropdown; the address of the work-site.
8. Job Title: Text field. Enter the plaintiff's job title.
9. Department: Text field. Enter the department the plaintiff works in.
10. Trade: Dropdown; the plaintiff's trade.
11. Contact Person Name: Contact-list dropdown; the contact person at the place of employment.
12. Union: Contact-list dropdown; the union the plaintiff belongs to.
13. W/C Claim: Check this box if there is a worker's compensation claim related to this incident.
14. Employer Comments: Enter comments applicable to the employer.
15. Salary: Text field. Enter the amount of the payment for salary.
16. Salary Frequency: Dropdown; the frequency of the payments for salary.
17. Commission: Text field. Enter the amount of the payment for commissions.
18. Commission Frequency: Dropdown; the frequency of the payments for commissions.
19. Bonus: Text field. Enter the amount of the payment for bonuses.
20. Bonus Frequency: Dropdown; the frequency of the payments for bonuses.
21. Over Time: Text field. Enter the amount of the payment for over time.
22. Over Time Frequency: Dropdown; the frequency of the payments for over time.
23. Other Compensation: Text field. Enter the amount of the payment for other compensation.
24. Other Compensation Frequency: Dropdown; the frequency of the payments for other compensation.
25. Temporary Total Disability: Text field. Enter the temporary total disability.
26. Average Weekly Wage: Text field. Enter the average weekly wage.
27. Compensation Comments: Enter comments applicable to compensation.
28. Update: Once all the employment and compensation information has been entered, click update to save the information.

Incident

The Incident/Injury tab is where you enter the details of the inciting incident of the case, and any injuries to any plaintiff resulting from the incident. Most aspects of this tab vary depending on the case type selected in the Plaintiff tab.

The Structure of This Tab

1. [Incident Details](#). Contains the basic details of the inciting incident of the case and provides reference information about the firm project associated with the case type. The State and Date fields must be completed for the SOLs to calculate.
2. [Questions](#). Contains user-defined fields (UDFs) associated with the case type or incident type.

Incident Details

The Incident Details area includes a section for the details of the project tied to the case type. See the [Project Details](#) page for defining firm projects. If the portion of the case type before the first hyphen matches the name of a defined project, then the Incident Details area will include the status of that project, and the hypertext Show Project Details. Clicking the hypertext will bring up a panel that displays the project name and status, target injury, and intake issues.

The area also allows you to specify the incident dates and states in the case. Because you can define up to four incident dates for any case type, this area may include up to four similar sets of fields, with different titles. The Incident Date and State must be completed for the calculation of the case's SOLs. The area contains the following fields:

1. State: Dropdown; The state in which the incident occurred. This field appears once for each incident date in the case type. The states where your firm primarily practices can be configured by the administrator to appear at the top of the list, to make it easier to choose these jurisdictions. A full list of all states can still be accessed by scrolling down the list.
2. Date: Date-widget dropdown; the date of the incident. This field appears once for each incident date in the case type.
3. Time: Text input; the time of the incident. This field appears once for each incident date in the case type.
4. UM State: The state in which the incident occurred. This field appears once for each incident date in the case type. The states where your firm primarily practices can be configured by the administrator to appear at the top of the list, to make it easier to choose these jurisdictions. A full list of all states can still be accessed by scrolling down the list.
5. UM Date: Date-widget dropdown; the date of the incident. This field appears once for each incident date in the case type.
6. UM Time: Text input; the time of the incident. This field appears once for each incident date in the case type.
7. Facts: Text input; the facts of the case. This field only appears once.

Questions (User-Defined Fields)

The fields in the Questions area are almost completely dependent on the case type. Even the heading of the area is actually the Type of the case type followed by Questions. The only field that is present regardless of the case type is a dropdown containing the case subtypes associated with the selected case type, which can be used to change the selected case subtype. The rest of the area contains user-defined fields, or UDFs. See the [UDF Editor](#) administrative page for creating and managing UDFs. Incident Type UDFs that belong to the incident type the selected case type is part of and have a Screen value of Incident Wizard, and Case Type UDFs that belong to the selected case type and have a Screen value of Case Wizard, will appear in this area; no other UDFs from the case type or incident type will appear.

Injury

The Injury tab allows you to record the injuries suffered by each plaintiff. The fields for recording injuries only appear once in this area, regardless of the number of plaintiffs; however, the contents of the No Injury, Other Injuries, and [Quick Injuries] fields are specific to the plaintiff listed in the Select Plaintiff field. This means there may effectively be multiple copies of each of these fields, one for each plaintiff in the case, but only the copy for the selected plaintiff is visible at any given time. When the case is created, the injuries recorded for each plaintiff will be added to the case file, regardless of which plaintiff's injuries are visible at the time the case is created.

The Structure of This Tab

1. Serious Injury: Checkbox; whether the case involves a serious injury. Note that while the existence or absence of a serious injury in a case is noted in various Reports and Dashboards, it has no specific definition within SmartAdvocate. Thus, your firm can determine how this checkbox will be used and the exact meaning or purpose of a checked or unchecked box. (For example, some firms use this checkbox to indicate whether the verbal threshold has been met in an automobile accident case.)
2. Select Plaintiff: Dropdown; used to select each plaintiff to record injuries. When the selection in this field changes, the No Injury, Other Injuries, and [Quick Injuries] fields automatically change to reflect the selections made for that plaintiff.
3. No Injury: Checkbox; Check this box when the selected plaintiff personally suffered no injury related to the case.
4. Other Injuries: Text input; any injury to the selected plaintiff not covered by the Quick Injuries for the case type. This field appears three times, so that up to three injuries may be recorded for each plaintiff.
5. [Quick Injuries]: Checkbox group; injuries to the selected plaintiff that are common for the case type. Quick Injuries is configurable by the administrator for each case type.

Source

The Source tab is where you select the contact or advertising source that referred the case to your firm.

The Structure of This Tab

1. [Paid Advertising](#): Contains the details of the advertisement that prompted the plaintiff to contact your firm.
2. [Referring Attorney](#): Contains the details of a referral by an attorney or law firm.
3. [Other Referral](#): Contains the details of any other form of referral.

Paid Advertising

The Paid Advertising area contains the following fields:

1. Source of Advertisement: Dropdown; used to select the advertisement that prompted the plaintiff to contact your firm. Every active contact in the Contacts List with Advertise as the contact type will be listed.
2. Comments: Text input; any comments about the advertisement.

Referring Attorney

The Referring Attorney area contains the following fields:

1. Law Firm: Contact-list dropdown (Law Firm type contacts only). The law firm that made the referral.
2. Attorney: Contact-list dropdown (Attorney and Defense Attorney type contacts only). The attorney that made the referral. If the Law Firm field is not blank, the dropdown will only include attorneys employed by the selected law firm.
3. Comments: Text input; any comments about the referral.

Other Referral

The Other Referral area contains the following fields:

1. Source Name: Contact-list dropdown; The contact that made the referral.
2. Relationship: Dropdown; the referring contact's relationship to your firm. Contact Relationships are configurable by the administrator.
3. Comments: Text input; any comments about the referral.

Finish Wizard and Generate Case

The Finish Wizard and Generate Case tab is used to create the case file once the case information has been entered. There are three options in the Finish Wizard:

1. Reject: Case will be rejected and notification of the rejection will be sent to the plaintiff.
2. Review: Case will be created and can be retained later.
3. Retain: Case will be retained and retention documents will be sent to the plaintiff.

Reject Case

If this case will be rejected, select Reject Case.

1. Reason: Dropdown; used to select the reason for rejection.
2. Generate document: Checkbox; select to generate a rejection document to plaintiff.
3. Select template: Dropdown; used to select which document template should be generated to the plaintiff.
4. Review before Sending (document): Checkbox; select to review the document before sending to the plaintiff.
5. Send email: Checkbox; select to generate a rejection email to plaintiff.
6. Select template: Dropdown; used to select which email template should be generated to the plaintiff.
7. Review before Sending (email): Checkbox; select to review the email before sending to the plaintiff.
8. Send text: Checkbox; select to generate a rejection text to plaintiff.
9. Select template: Dropdown; used to select which text template should be generated to the plaintiff.
10. Review before Sending (text): Checkbox; select to review the text before sending to the plaintiff.
11. Select Generate & Reject once template(s) are chosen to send to plaintiff.

Review Case

If this case requires further review, select Review Case. Then click Generate & Review.

Retain Case

If this case will be retained, select Review Case.



1. Choose between generating an eSign document or non-Esign document to manually send to the plaintiff.
2. If choosing to manually send a document to the plaintiff, select a template to generate to send to the plaintiff.
 - a. If choosing to send an eSign document to the plaintiff, select the eSign template to generate.
 - b. Select the text capable phone number or email address to send the eSign document to the plaintiff.
3. Review before sending: Checkbox; select to review the document before sending to the plaintiff.
4. Click Generate & Retain to generate documents and open the case.

When you click the generate button, regardless if the finish option chosen, if the required information has been included, the Case Wizard will close and the [Case Summary](#) page of the new case will open. If the required information has not been included, the tab will instead display a list of the individual Case Wizard tabs and whether sufficient information has been added to each of them. Tabs that have been adequately filled out are listed as OK; tabs that have not are listed as Not Completed, and the missing information may also be listed.



The list displayed, and the information required, is as follows:

Case Type

You must select a case group, type, and subtype from the Case Group, Case Type, and Case Sub Type areas in the Plaintiff tab to complete this section.

Plaintiffs

This section includes all the plaintiffs that have been added. In order for this section to be listed as OK, there must be at least one plaintiff, and every plaintiff's section must also be completed.

Plaintiff 1, Plaintiff 2, Plaintiff 3

Each plaintiff that has been added is listed separately. In order for a plaintiff to be listed as OK, the First Name, Last Name, and Gender fields in the Contact area must be filled in, as must the [Plaintiff Role] field in the Plaintiff's Role in the Case area.

Defendant

If no defendant has been added, this section will not appear in the Finish Wizard and Generate Case tab; entering a defendant is not necessary for the Case Wizard to complete. If a defendant has been added, then in order for the section to be listed as OK, the First Name, Last Name, and Gender fields in the Contact area must be filled in, as must the [Defendant Role] field in the Defendant's Role in the Case area. Whether the Defendant tab appears in Case Wizard is configurable by the administrator.

Incident

In order for this section to be listed as OK, you must select a state in the State field of the first incident date (the upper left one, if there are more than one) in the Incident Details area of the Incident/Injury tab. The incident date is not required but it is highly recommended that it be completed if available, so SmartAdvocate can calculate any applicable SOLs.

Injury

In order for this section to be listed as OK, at least one of the No Injury, Other Injuries, or [Quick Injuries] fields for at least one of the plaintiffs in the Injury area of the Incident/Injury tab must be selected or non-blank. Any single field, for any single plaintiff, is enough to complete this section.

Source

In order for this section to be listed as OK, there must be a selection in at least one of the Source of Advertisement, Law Firm, Attorney, or Source Name fields in the various areas in the Source tab.

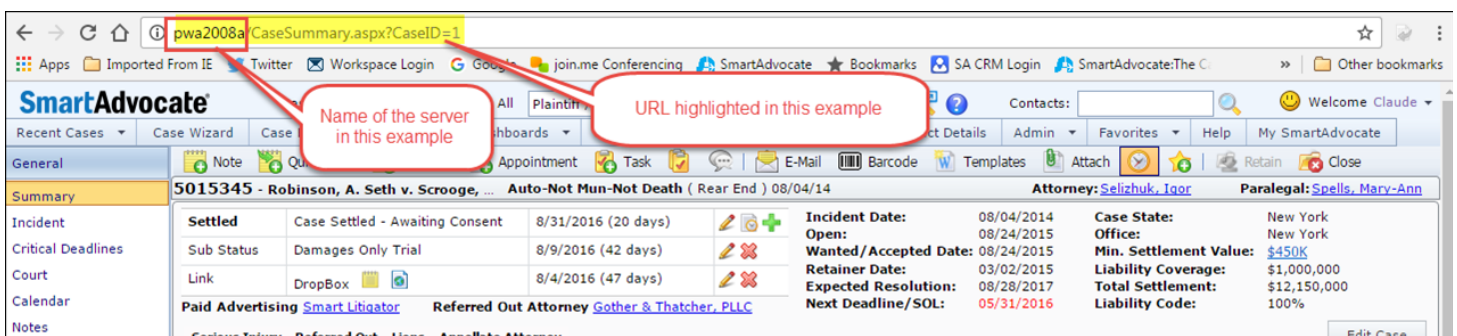
Plug-Ins

The installation of several plug-ins is required to enable the interaction between SmartAdvocate and Word, Office, and Google Chrome. These plug-ins must be installed on each workstation from which SmartAdvocate will be accessed.

All plugins required by SmartAdvocate will be located in the "Plugins" directory on the server where SmartAdvocate is installed. You will need to run the required plugins on *each* work station (You may need supervisor rights on the work station to be able to successfully install the plugins. Please check with your IT department).

The Plugins directory should have a network path that may look similar to the following: \\[yourserver]\plugins (file:/// [yourserver] plugins) [*substitute 'yourserver' with the actual name of your server.*]

Tip
To find the name of your server, start SmartAdvocate, and the name of your server will be displayed as a URL in your browser. See example below.



| Staff | Add Show History | | Last Notes | Add | |
|----------------------|---------------------------------|------------------|---|--|------------------|
| Attorney | Simpson, Claude, Esq. | | Plaintiff - Left Message for plaintiff - 09/13/2016 11:29:00 AM by Simpson, Claude | | |
| Case Manager | Ramadan, Schery | | Aarons, Mark, Esq. at (212) 822-1504 | | |
| Primary Attorney | Selizhuk, Igor | | Called Client - Left message with a person who answered the phone additional test | | |
| Primary Paralegal | Spells, Mary-Ann | | Adjuster - 09/13/2016 11:29:00 AM by Simpson, Claude | | |
| Investigator | Cicali, Joseph | | Called Adjuster and left a message on voice mail | | |
| | | | Medical Records - 09/13/2016 11:20:00 AM by Simpson, Claude | | |
| Pending Appointments | | | Tasks | Add | |
| 08/24/2016 | Discovery - | This is for demo | 08/31/2016 | Discovery | Ramadan, Schery |
| 08/31/2016 | Deposition - Plaintiff Expert - | Training | 08/31/2016 | Call A. Seth Robinson back at (914) 555-1212 | Spells, Mary-Ann |
| 09/16/2016 | Deposition - All Parties - | | 09/01/2016 | Motion Motion | Simpson, Claude |
| 09/28/2016 | Motion - | | 09/13/2016 | Defendant MV Search | Cicali, Joseph |
| | | | 09/13/2016 | Investigation needed | Spells, Mary-Ann |
| Courts / Dockets | | | Pending Critical Deadlines | | |

The Plugins directories will have several sub-directories:

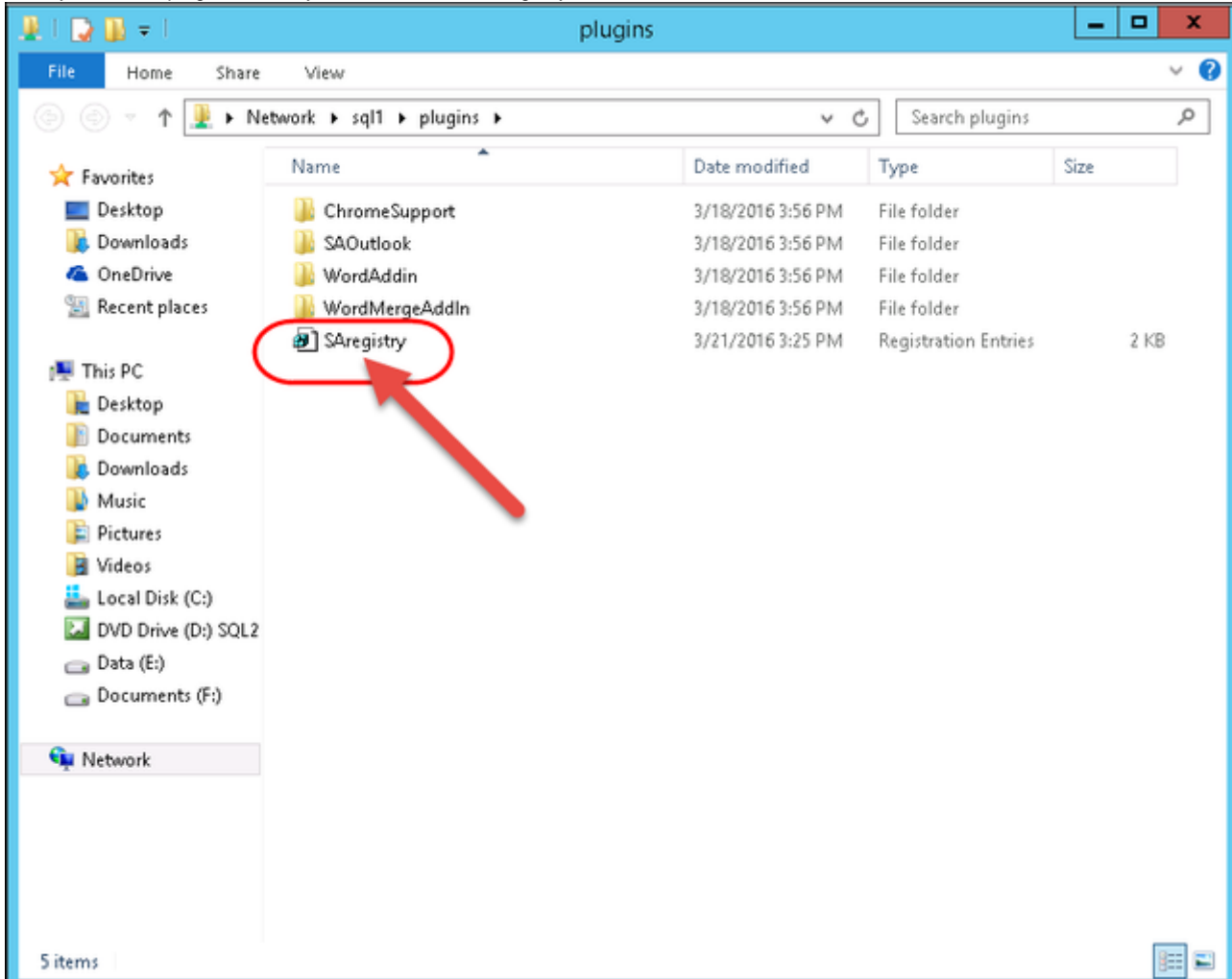
\\yourserver\plugins\ChromeSupport
 \\yourserver\plugins\SAOutlook
 \\yourserver\plugins\WordAddin
 \\yourserver\plugins\WordMergeAddin

Further, the ChromeSupport sub-directory will have two files in that sub-directory; (1) Chrome Extension Link, and (2) SADocumentLauncher. The installation of the Chrome Extension and Document Launcher are required for you to be able to open documents while running SmartAdvocate in Google Chrome.

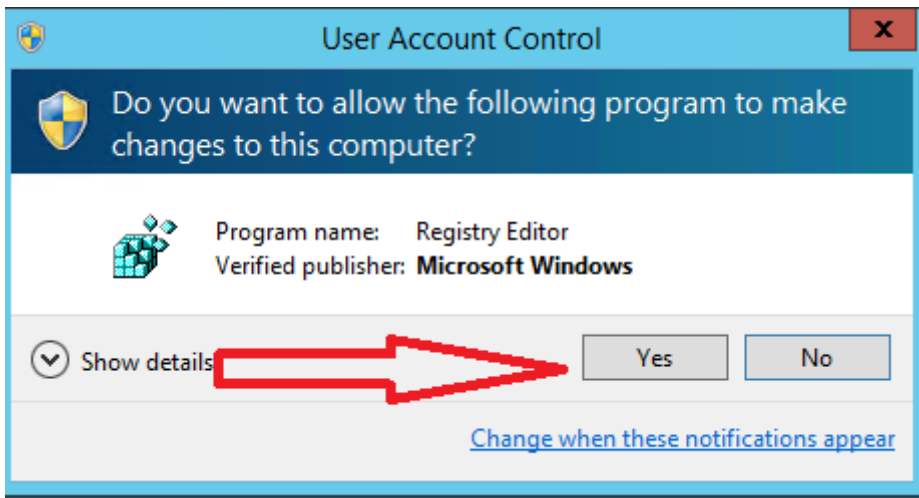
There is also a registry file (SRegistry) that is located in the plugins directory. You will need to run this file on the workstation to edit and update the registry.

SQL Configuration – Run SRegistry

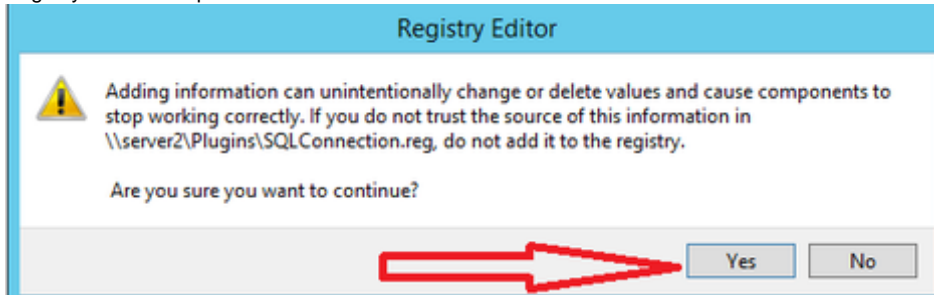
Go to your server plugins directory and double click SRegistry.



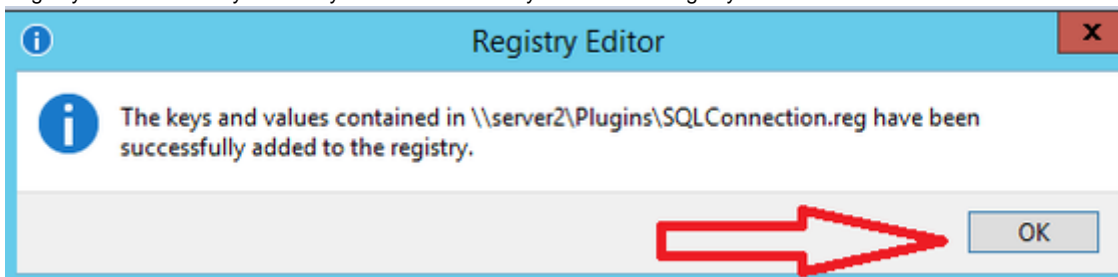
User Account Control will open. Click Yes.



Registry Editor will open. Click Yes.

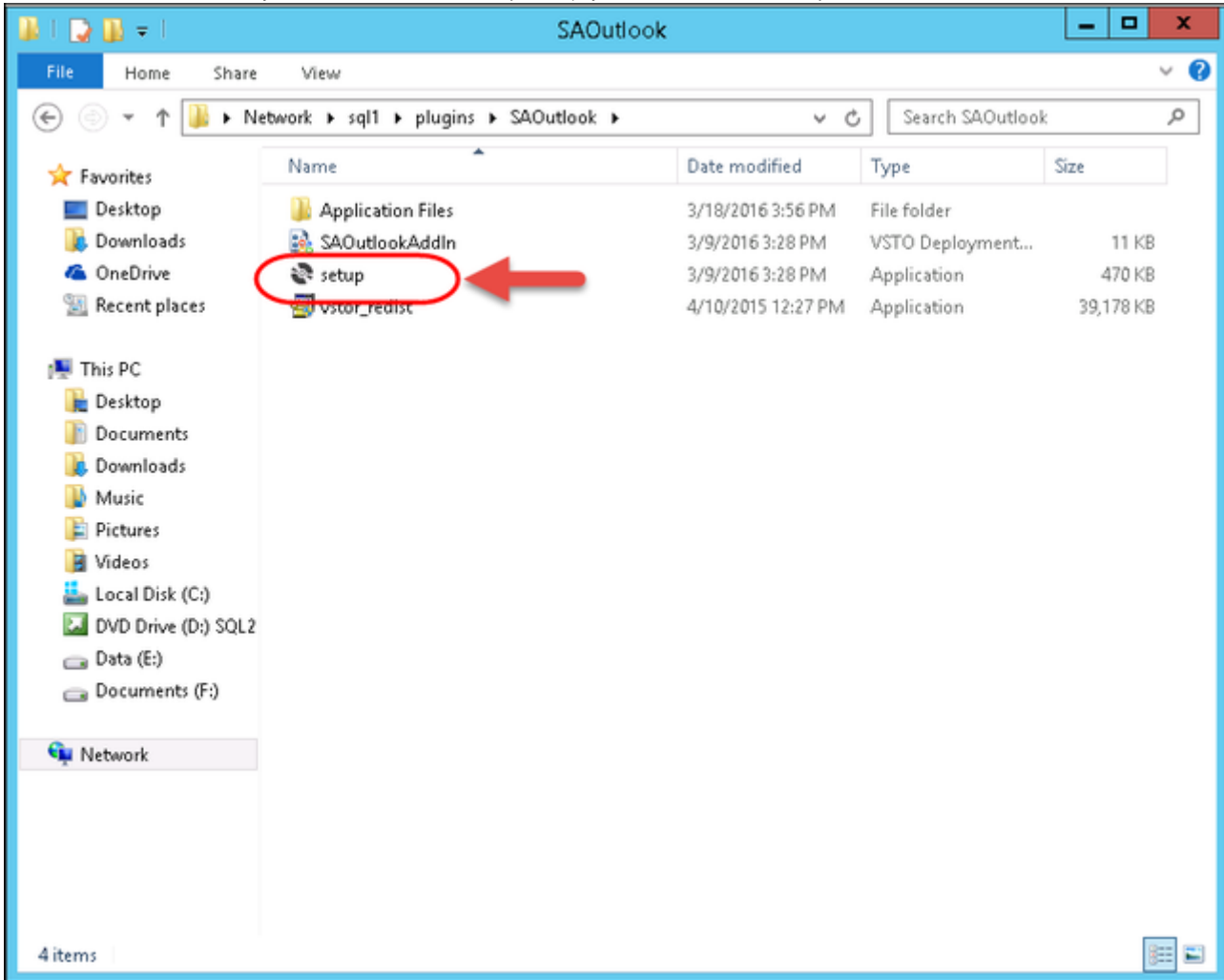


Registry Editor will alert you when you have successfully added to the registry. Click OK.



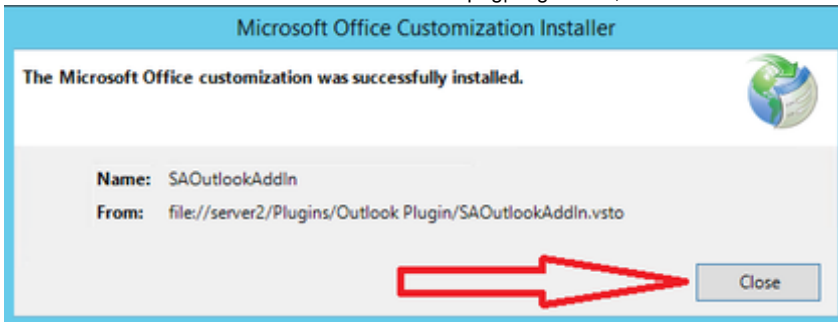
Install the SmartAdvocate Outlook Plugin

Go to the SAOutlook directory and double click the 'Setup' file. (If you do not have the 'setup.exe file, double click on the SAOutlookAddIn file).



Microsoft Office Customization Installer will open. Click Install.

!worddav50145bd0180ac0877793418fd6768d6b.png|height=207,width=424!Once installation is complete click Close.



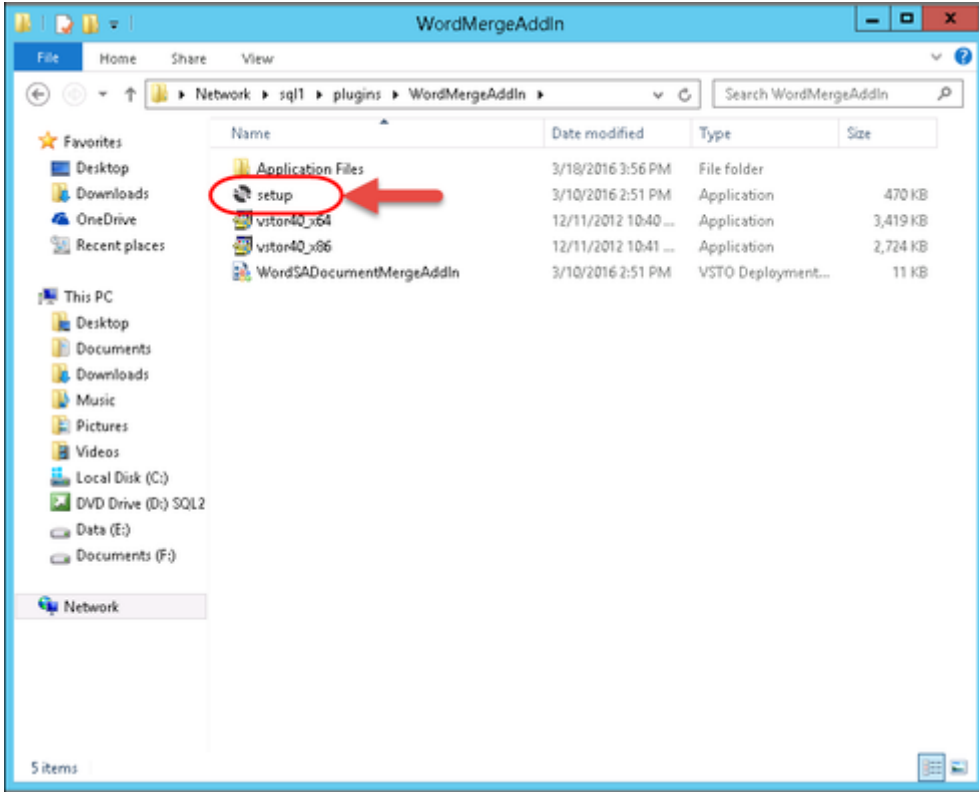
TIP!

We have seen a few instances where the Outlook plugin was disabled, and a yellow caution icon appeared in the "Slow and Disabled COM Add-ins" panel, making re-enabling impossible. The following process should get it back up and running:

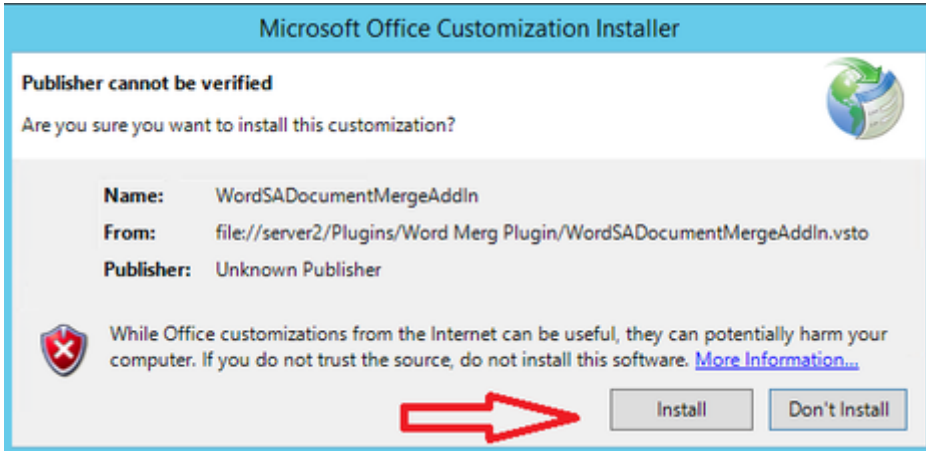
1. Go to File -> Options -> Add-ins. The SAOutlookAddIn will probably be listed under "Disabled Application Add-ins." If so, click the dropdown at the bottom (next to the word "Manage") and select "Disabled Items," then click the Go button.
2. Select the SAOutlookAddIn item in the list and click Enable, then click Close.
3. Click OK in the Add-Ins panel to save the change.
4. Go back to File -> Options -> Add-ins. The SAOutlookAddIn will now probably be listed under "Inactive Application Add-ins." If so, make sure "COM Add-Ins" is selected in the dropdown at the bottom, then click the Go button.
5. Select the checkbox next to the SAOutlookAddIn item in the list, then click OK.
6. The add-in should now be active, but it may not be set to stay activated when Outlook is next launched. Open the Registry Editor and go to HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\SAOutlookAddIn, then check the value of LoadBehavior. If it is not set to 3, set it to 3.

Go to the plugins folder on your server where SmartAdvocate is installed.

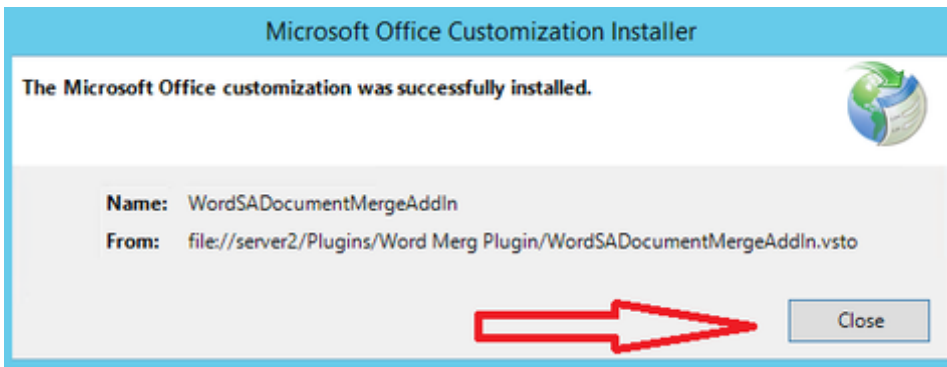
1. Open the WordMergeAddIn Folder
2. Double Click the Setup file. (If you do not have the 'setup.exe file, double click on the WordSADocumentMergeAddIn file).



1. Microsoft Office Customization Installer will open. Click Install.

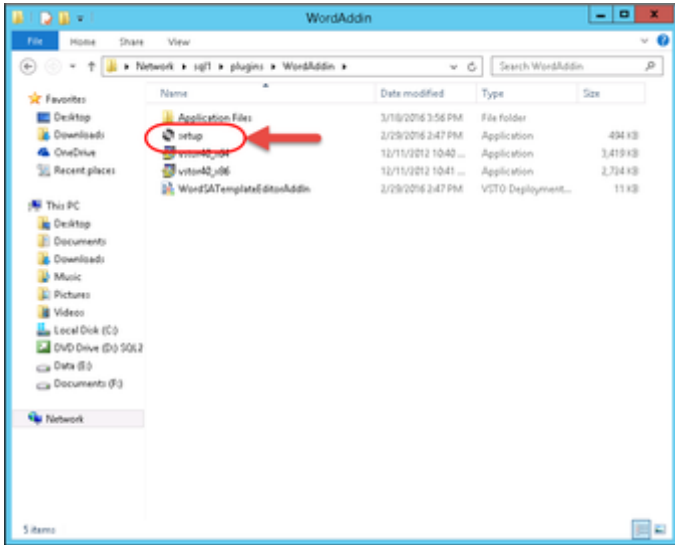


1. Once completed click Close.

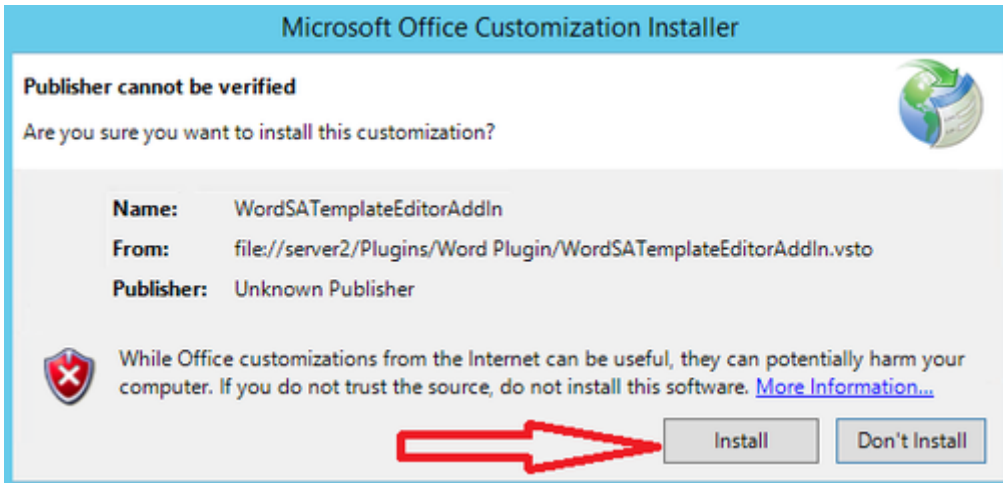


The Word Template Editor Plugin should only be Installed on Workstations for SmartAdvocate Administrators or for users who will be creating and/or editing Document Templates.

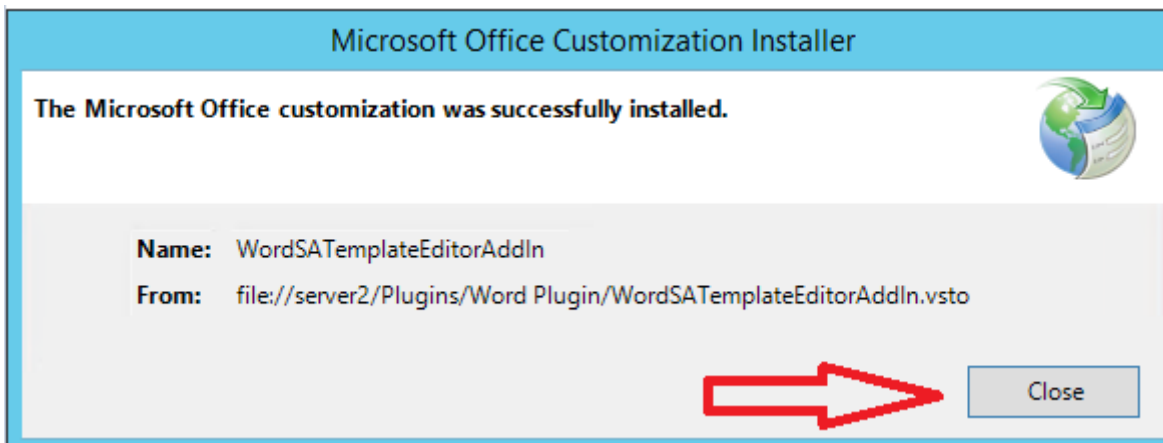
1. Go to the plugins folder on your server where SmartAdvocate is installed
2. Double click the Setup file. (If you do not have the 'setup.exe file, double click on the WordSATemplateEditorAddIn file).



1. Microsoft Office Customization Installer will open. Click Install.



1. Once completed click Close



Configuring Internet Explorer or Edge to Work with SmartAdvocate

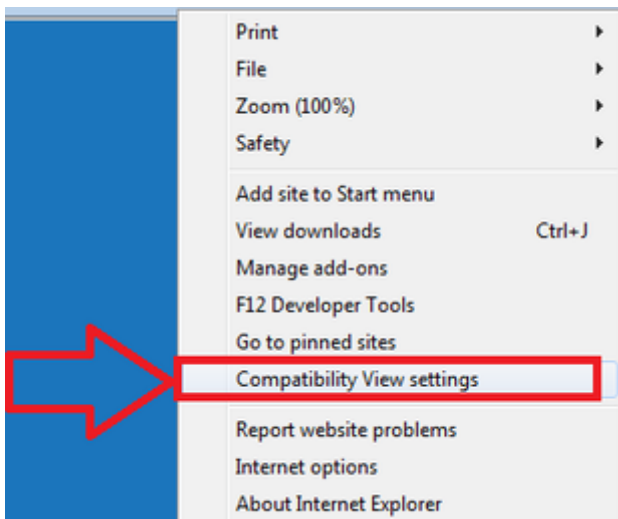
SmartAdvocate requires version 11 of Internet Explorer (SA will also work with Edge). SmartAdvocate will work with earlier versions of Internet Explorer, but some of the pages/dialogs might not render correctly. If necessary, you must update your browser to Internet Explorer 11 or later.
<http://www.microsoft.com/en-us/download/internet-explorer.aspx>

Once you have updated your browser to Internet Explorer 11 or later (if required) it needs to be configured to run SmartAdvocate pages **without** Compatibility Mode. You should see performance improvement compared to running pages in Compatibility mode.

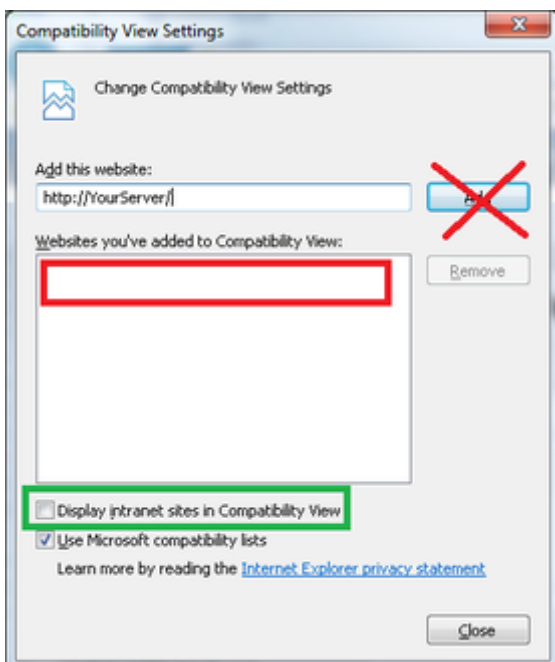
1. Click on the tools button on the upper right hand corner. (Or click ALT+X)



1. Go to Compatibility View settings.



1. Uncheck Display intranet sites in Compatibility View. Make sure that your SmartAdvocate server name is **NOT** in the list of sites. If your server name is on the list, select it and click remove.



Configuring Google Chrome to Work with SmartAdvocate

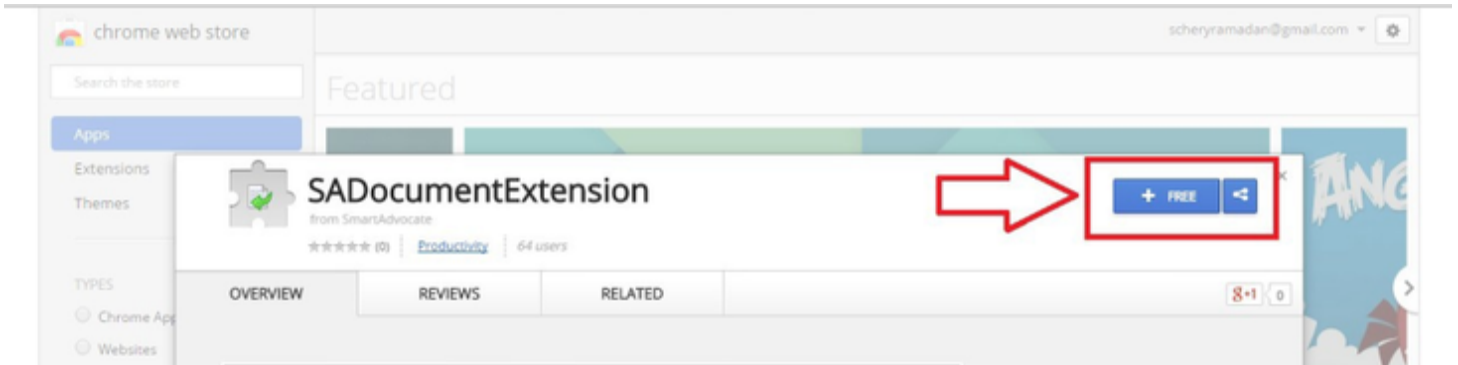
Full Chrome support (on Windows computers) has been implemented. Based on our experience, you should notice a performance boost using SmartAdvocate with Chrome.

You must install Chrome on your machine.

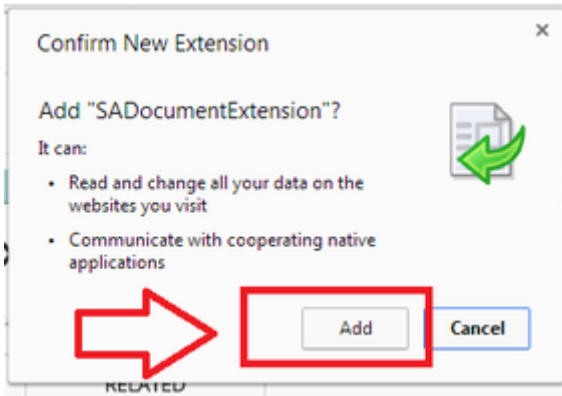
<https://www.google.com/chrome/>

Note that working with documents in Chrome requires two components, the SADocument Extension and the SA DocumentLauncher. Both files are available in the \\[yourserver]\plugins\ChromeSupport (file:///[yourserver]\plugins\ChromeSupport) folder on your server. Please follow the instructions below:

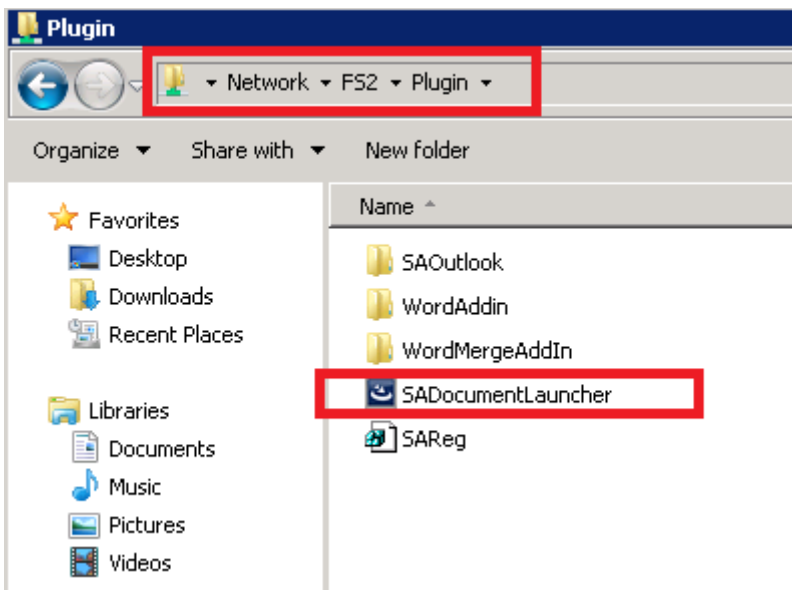
1. Click on the Chrome Extension below. <https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnplmdligcclbkihfahdnph?hl=en-US>
2. Click on the Free button (on some computers this may say 'ADD TO CHROME' or something similar) on the right-hand side and download the SADocument Extension.



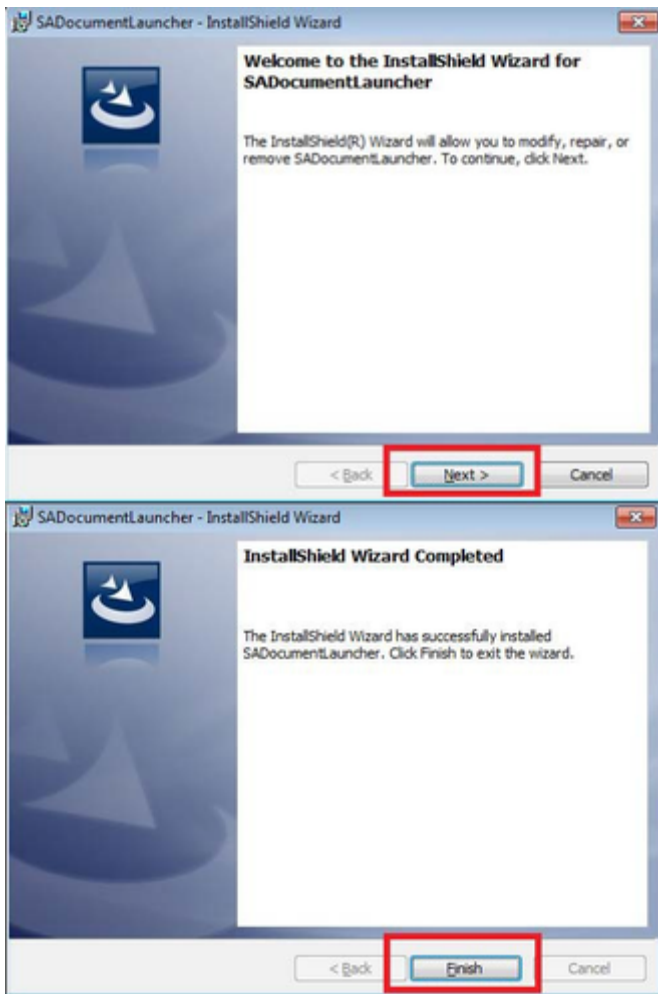
1. Click Add on the pop up.



1. You must also install the SADocumentLauncher from the \\[yourserver]\plugins\ChromeSupport folder on your server. (Below is an example on our server.)



1. Double click the file and it will open a InstallShield Wizard. Click Next until you can click Finish.



Installation of Plugins for SmartAdvocate Cloud

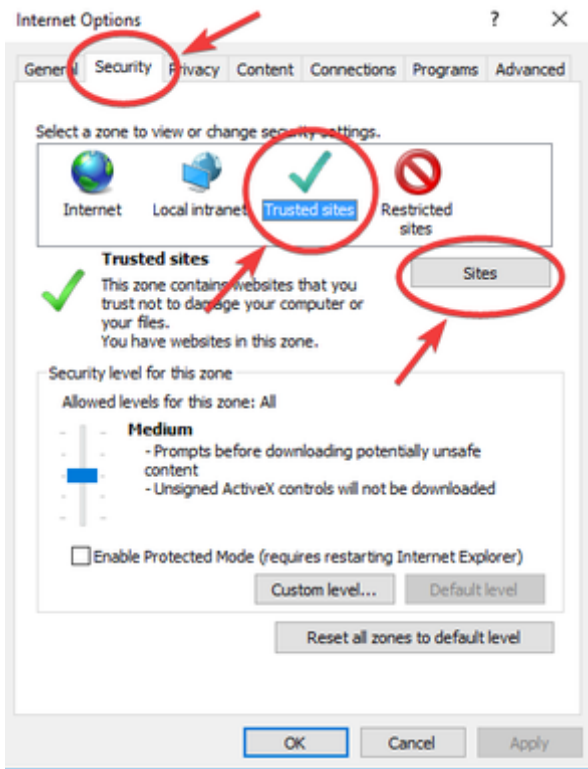
Please Note: The Word Template Editor (to create and or/edit Document Templates) is only compatible with Microsoft Windows. You must use a PC to create and or edit Document Templates. Generating a finished document from a case file can be done on a PC or MAC.

Before you proceed with adding the plugins and registry files to your computer, the SmartAdvocate website must first be added as a Trusted Site in Internet Explorer or Edge. ***This should be done even if you use Chrome or another browser to access SmartAdvocate.*** Open Edge or Internet Explorer. (The images that follow were taken from Edge; the process is similar in Internet Explorer.)

1. Click on the 'Settings' icon, and then 'Internet options'.

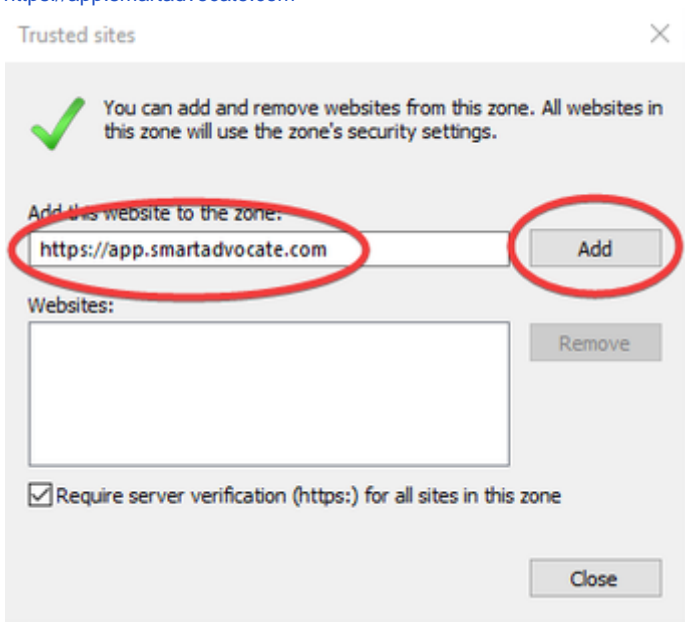


1. The 'Internet Options' panel will open. Click on the 'Security' tab, the 'Trusted sites' icon, and the 'Sites' button.



1. The 'Trusted sites' panel will open. Add the following website address and click 'Add':

<https://app.smartadvocate.com>



1. The website should then appear in the 'Websites' box. Click on 'Close'.

1. You can then proceed with the instructions below.

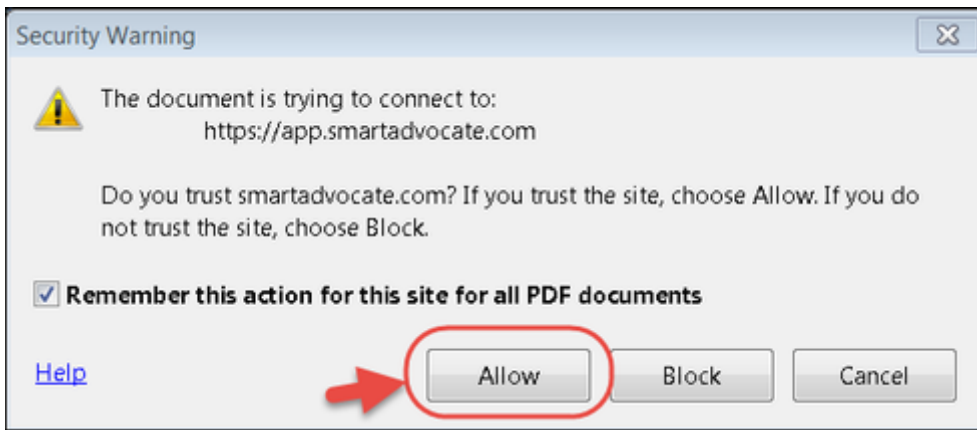
The Outlook, Word Template Editor and Word Merge *Cloud plugins* are accessible from the following web sites:

<https://app.smartadvocate.com/pluginsweb/Outlook/RegistrySetUpforOutlook.zip>

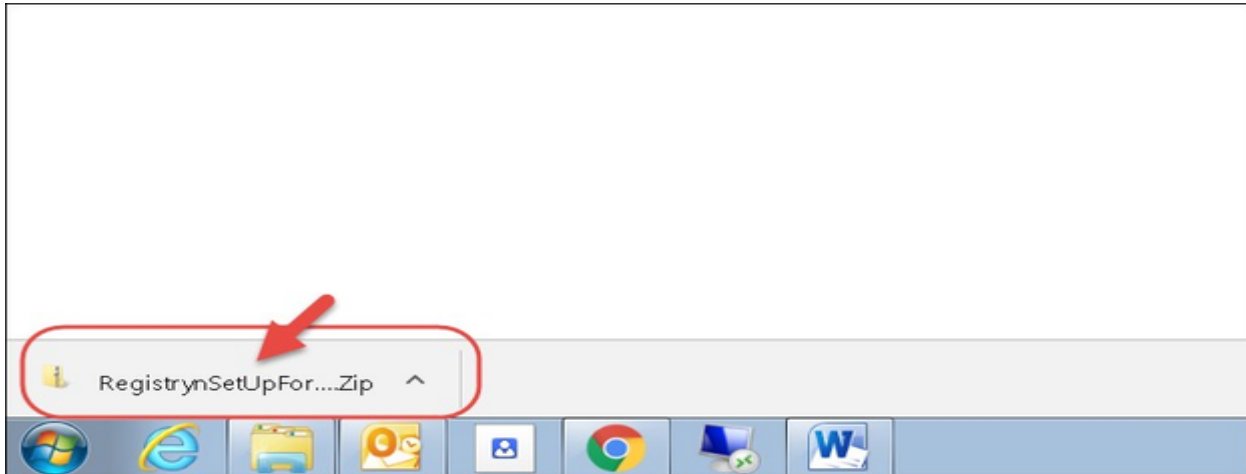
<https://app.smartadvocate.com/pluginsweb/saTemplateEditor/RegistrySetupforTemplateEditor.Zip>

<https://app.smartadvocate.com/pluginsweb/sawordmerge/RegistrySetupForMergeAddin.Zip>

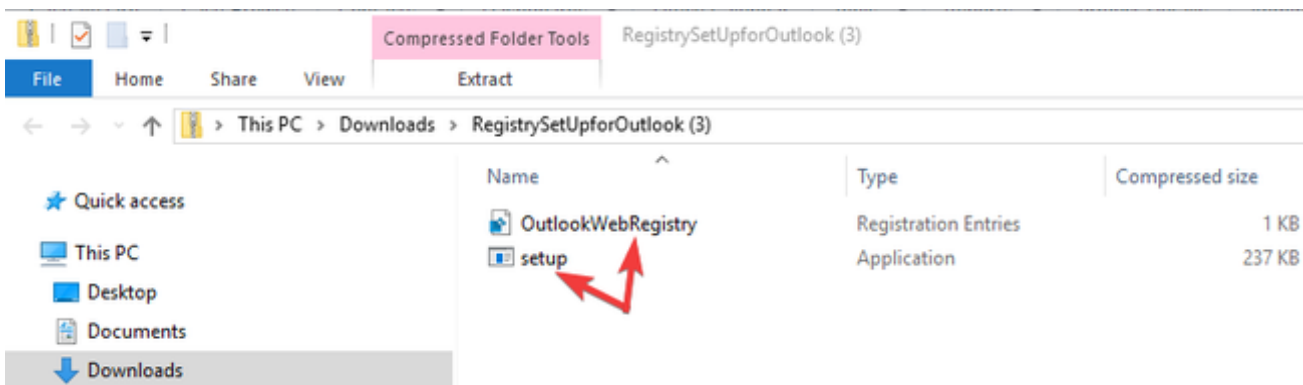
1. To install the plugins, click on each file/hyperlink listed above.
2. Depending on the security settings on your computer, you may be prompted to allow access to download the respective files. If prompted, click 'Allow' or 'OK'.



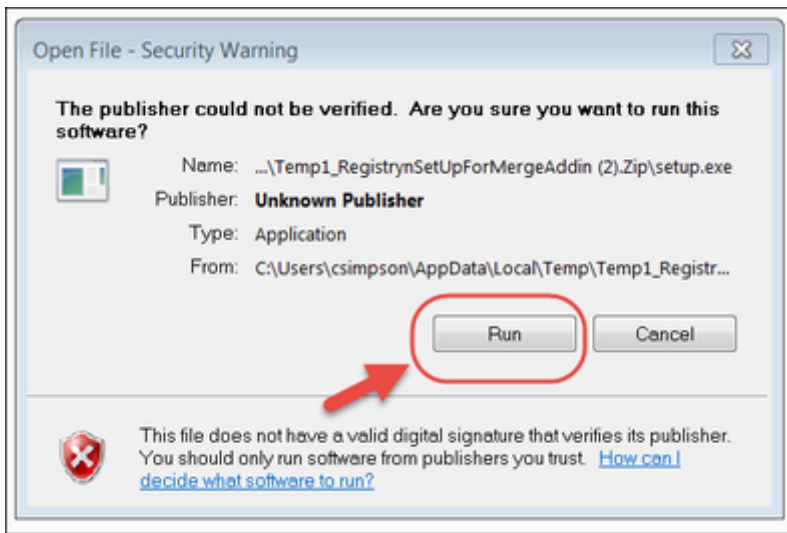
1. A zip file will download on your computer and will be displayed in the bottom left corner of your computer screen. Note that the location and appearance of the downloaded file may vary depending on the browser and browser version you are using.



1. Click on the downloaded file and a new window will open.



1. Each of the zip files you download will contain two files, a 'setup' file and a 'registry' file. You will need to run both files for each of the three zip files you download. Double click (launch) each file and click 'Run'. It does not matter in what order you run the files.



1. Follow the system prompts, accepting all defaults.

1. Repeat steps 1 through 6 for all three plugins and all three registry files.

NOTE: These files must be run or installed on each individual workstation or computer.

Depending on the security settings on your individual workstation/computer, you may need Administrator rights on the subject computer to be able to install programs, **including these plugins and registry files**, on that computer. If you are not comfortable performing the foregoing installation procedures please consult your IT professional.

Setting Up Barcode Scanning

See instructions in our Knowledge base

[Barcode Scanning Configuration](#)