

SmartAdvocate Release Notes (v2014.12.05)

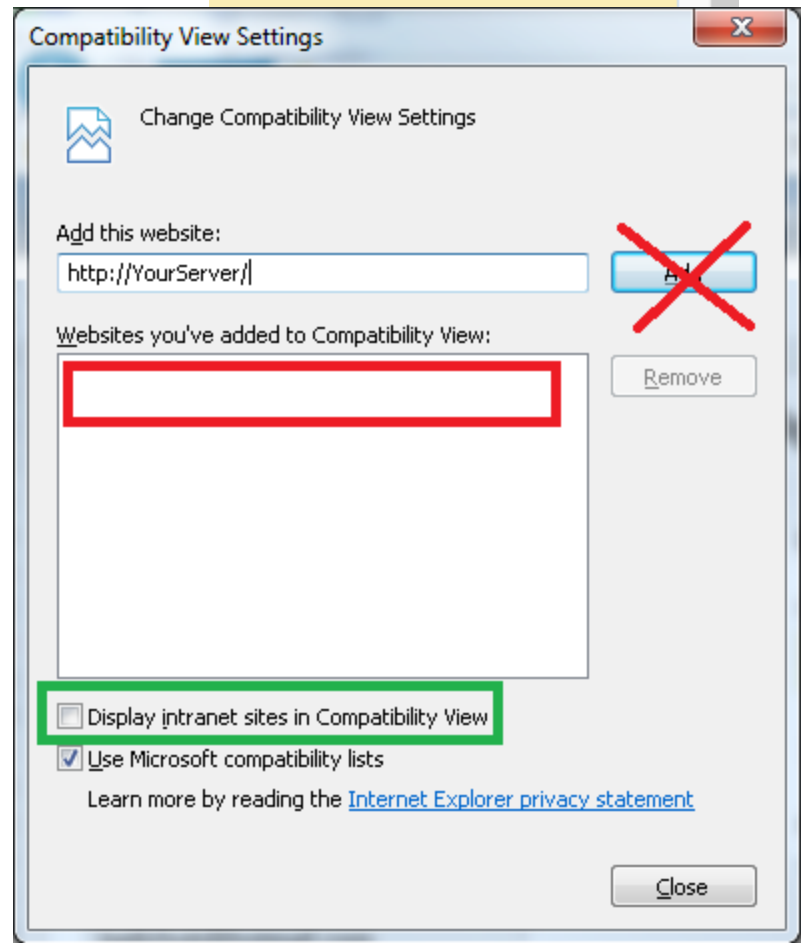
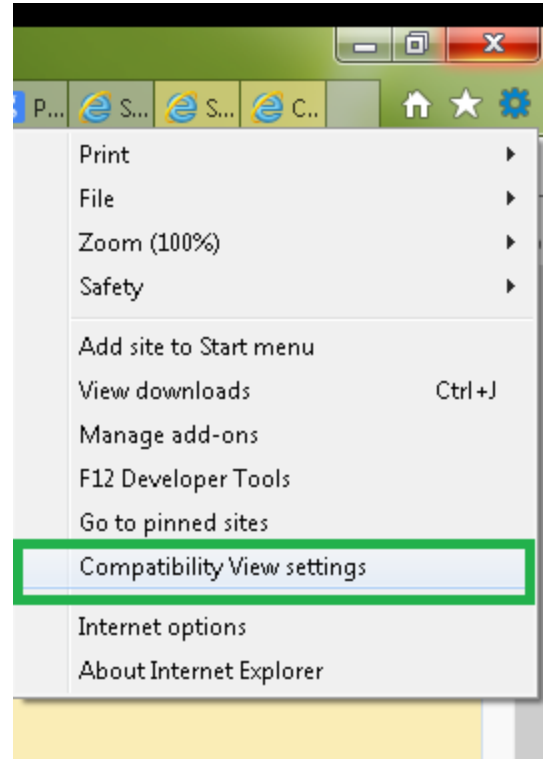
These release notes cover changes made to SmartAdvocate software between August 2014 and December 2014.

Important Notes

Starting from this release, **SmartAdvocate requires version 11 of Internet Explorer**. SmartAdvocate will work with earlier versions of Internet Explorer, but some of the pages/dialogs might not render correctly.

Also, Internet Explorer needs to be configured to run SmartAdvocate pages **without** Compatibility Mode. You should see performance improvement compared to running pages in Compatibility mode.

1. Go to Compatibility View settings
2. Uncheck Display intranet sites in Compatibility View. Make sure that your SmartAdvocate server name is **NOT** in the list of sites.



Google Chrome Support

Full Chrome support (on Windows computers) has been implemented. Based on our experience, you should notice a performance boost using SmartAdvocate with Chrome.

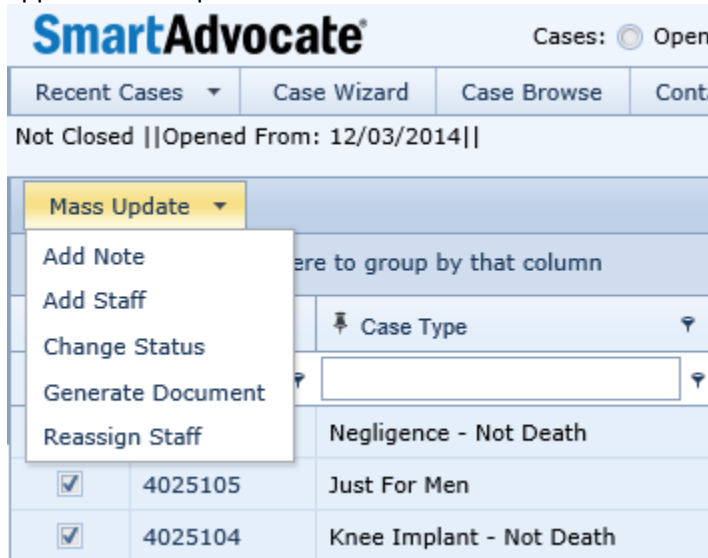
Note that working with documents in Chrome requires two components:

- Chrome Extension
<https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnpdldmlicclbkihfbahdnph?hl=en-US>
- Document Launcher Application - SADocumentLauncher.exe

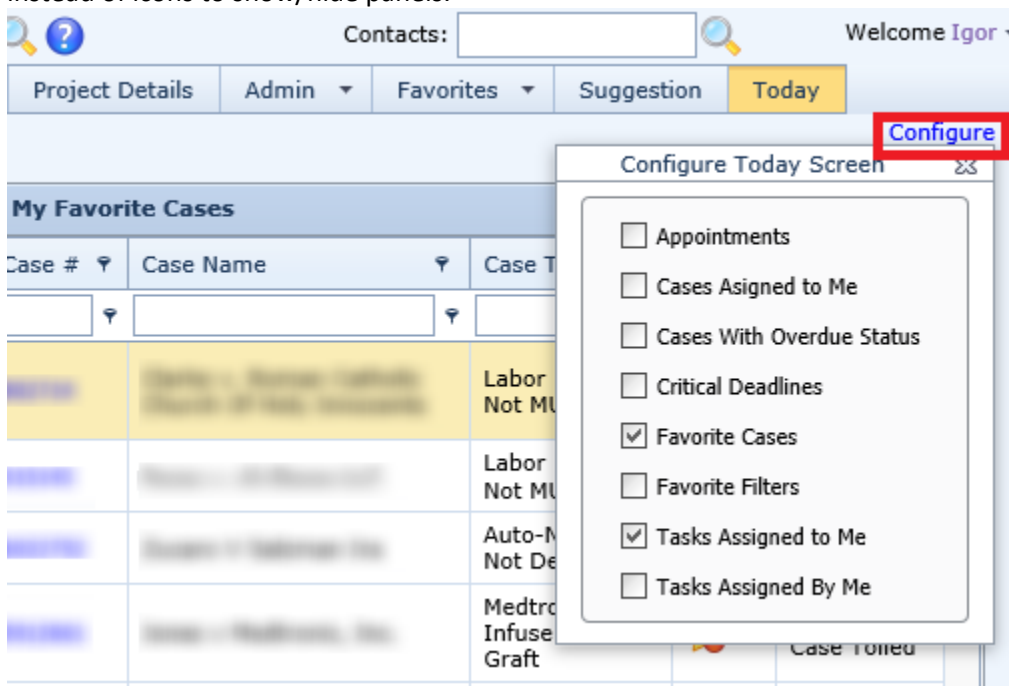
Updated Pages - Description of Update/Change

- Office Calendar, Case Calendar – added option to show appointment history for adjourned/canceled appointments.
- Dashboards (Intake Follow-up & My Cases) – Added optional columns (Status Comment and 3 Additional status columns)
- Case – Case Summary - Most recent pending activities will show up on top of the list. Added support for right-click on pending activities panel to edit the calendar item from the Case Summary.
- Case – Critical Deadlines - New page design implemented.
- Case – Caption - New Rich Text edit control.
- Case – Documents - Multiple new columns added (File Name, Extension, Direction, Origin, Type).
- Plaintiff. Page design updated.
- Plaintiff – Plaintiff Attorney - New page design implemented. Comments field added.
- Plaintiff – Medical Providers - Ability to delete (in addition to cancel) medical records request (if permissions allow that), comments as a separate column on the Medical provider list (hidden by default), Specialty/Subspecialty as a separate column (visible), Add/remove columns button, added ability to enter number of visits to medical provider info.
- Plaintiff – Other Providers - New page design implemented.
- Plaintiff – Prior Injuries - New page design implemented.
- Plaintiff – Adverse Exams - New page design implemented. Insurance Company field added.
- Plaintiff – Vehicles - Added field to indicate license restrictions
- Defendant – Vehicles - Added field to indicate license restrictions
- Project details – Introduced ability to add multiple notes about the project.
- Litigation – Trial Prep - New page design implemented.
- Litigation – Depositions - New page design implemented.
- Case Wizard - Optional Defendant tab (system-wide configuration to show or not to show in the New Case Wizard).
- Mass Mail page - New page design implemented. Currently the new page is available via Tools -> Mass Mailing Beta. It is also used if Mass Action -> Generate Document is used from the Case Browse results page.
- Admin – Pick list Maintenance - Added multiple Pick Lists.
- Admin – Quick Injury – Added ability to copy specific quick injuries to multiple case types.

- Case Browse Results - Support for multi-select and Mass Actions implemented. Available Mass Actions include Add Note, Add Staff, Change Status, Generate Document and Reassign Staff. Each of these actions can now be applied to multiple cases at one time



- Today Screen – “Widget” performance has been improved. The ability to add widgets has been improved. Also, the ability to add and remove columns within each widget has been introduced. Configuration link is added instead of icons to show/hide panels.



- New Case Wizard - Add New Contact - Ability to select any phone type via pick list is introduced.

New Merge Codes Added

DOC-LIST	List of All Doctors with Their Full Names
CA-STAFF-CNTY	Case Staff county
DEF-INS-POLICY-LIMIT	Defendant Insurance policy limits
MED-PRVD-START-DATE-EXP	Medical Provider Start Date Expanded
MED-PRVD-END-DATE-EXP	Medical Provider End Date Expanded
PL-SCHOOL-ADDRESS-BLOCK	Plaintiff School Address Block with Name
PL-ATTY-FILE#	Plaintiff Attorney File Number (this is not your file #)
MED-PRVD-FILE-NUM	Medical Provider File Number
PL-MIDDLE-NAME	Plaintiff Middle Name
SET-AMOUNT-CASE-TOTAL	Settlement Amount - Case Total
SET-AMOUNT-PL-TOTAL	Settlement Amount - Total for Plaintiff
ATTY-FOR-LIST-OTHERS	Attorney Firm List Other than Your Firm including parties they represent
PL-PHONE#-WORK	Plaintiff Work Phone Number
EXP-ADDRESS-BLOCK	Expert address block
DEF-ATTY-FIRM-EMAIL	Defendant Law Firm email
CA-EXP-TOT-ALL	Case Disbursements - Total all disbursements
CA-EXP-TOT-ALL-EXP	Case Disbursements - Total all disbursements expanded
CA-EXP-TOT-NR	Case Disbursements - Total only disbursement types non recoverable
CA-EXP-TOT-NR-EXP	Case Disbursements - Total only disbursement types non recoverable expanded
CA-EXP-TOT-WV	Case Disbursements - Total only disbursement types waived
CA-EXP-TOT-WV-EXP	Case Disbursements - Total only disbursement types waived expanded
CA-EXP-TOT	Case Disbursements - Total only disbursement types recoverable and not waived
CA-EXP-TOT-EXP	Case Disbursements - Total only disbursement types recoverable and not waived expanded

CA-STAFF-EMAIL	Case Staff email
CA-STAFF-PHONE	Case staff phone
CA-ATT-EMAIL	Case Attorney Email
CA-PARA-EMAIL	Case Paralegal email
FIRM-STAFF-EMAIL	Firm staff email
FIRM-ATTORNEY-EMAIL	Firm Attorney email
FIRM-PARALEGAL-EMAIL	Firm paralegal email
APPMNT-TO-DATE-EXP	Appointment End Date Expanded
APPMNT-FROM-DATE-EXP	Appointment Start Date Expanded
APPMNT-TO-TIME	Appointment End Time
APPMNT-FROM-TIME	Appointment Start Time
APPMNT-JUDGE-NAME	Appointment Judge Full Name
MED-PRVD-LIST	Medical Provider - List of All Medical Providers
CA-ATTY-LAST-NAME	Case Attorney Last Name
CA-ATTY-FIRST-NAME	Case Attorney First Name
CA-LIEN-TABLE-BY-PL	Lien Table by Plaintiff
PL-LIEN-TABLE	Plaintiff Lien Table
PL-SSN-LAST4	Plaintiff Social Security Number Last 4 Digits
PL-SSN-MASK5	Plaintiff Social Security Number Masking first 5 Digits
MED-PRVD-TABLE	Medical Provider - Table of All Plaintiff Providers
PL-DOC-NAME-LIST	Plaintiff Doctor - List Of Full Name Of All Plaintiff Doctors - Vertical
PL-HOSP-NAME-LIST	Hospital Names - List of All Hospital Names
PL-MED-PRVD-NAME-LIST	Plaintiff Medical Provider - List of All Plaintiff Medical Provider Names - Vertical
REF-FAX	Referral Attorney - Fax
REF-OTHER-REFTYPE	Other Referral Primary/Secondary
REF-OTHER-RELATION	Other Referral - Relationship to Firm
REF-OTHER-SOURCE	Other Referral Name
REF-OTHER-RECDT	Other Referral Received Date
REF-ADV-NAME	Referral Advertisement Source - Name
REF-ADV-ADDR1	Referral Advertisement - Address
REF-ADV-ADDR2	Referral Advertisement - Address Second Line
REF-ADV-ADDR3	Referral Advertisement - Address Third Line
REF-ADV-CNTY	Referral Advertisement - Address County
REF-ADV-PREFIX	Referral Advertisement - Prefix
REF-ADV-FAX	Referral Advertisement - Fax Number
REF-ADV-CITY-STATE-ZIP	Referral Advertisement - Address City, State Zip
REF-ADV-DSCRPTN	Referral Advertisement - Sub Type
REF-ADV-NOTE	Referral Advertisement - Comments
REF-ADV-PHONE#	Referral Advertisement - Phone Number
REF-OTHER-NAME	Other Referral - Full Name
REF-OTHER-ADDR1	Other Referral - Address Line 1
REF-OTHER-ADDR2	Other Referral - Address Line 2
REF-OTHER-ADDR3	Other Referral - Address Line 3
REF-OTHER-CITY-STATE-ZIP	Other Referral - Address City, State Zip
REF-OTHER-CNTY	Other Referral - Address County
REF-OTHER-FAX	Other Referral - Fax
REF-OTHER-PREFIX	Other Referral - Prefix

REF-ATTY-CITY-STATE-ZIP	Referring Attorney - Address City, State Zip
REF-LF-CITY-STATE-ZIP	Referring Law Firm - Address City, State Zip
REF-ATTY-CNTY	Referring Attorney - Address County
REF-LF-CNTY	Referring Law Firm - Address County
REF-ATTY-FAX	Referring Attorney - Fax
REF-LF-FAX	Referring Law Firm - Address Fax
PL-DOC-NAME-LIST-HORIZ	Doctors Names – List of All Doctors Names - Horizontal
PL-HOSP-NAME-LIST-HORIZ	Hospital Names – List of All Hospital Names - Horizontal
PL-MED-PRVD-NAME-LIST-HORIZ	Medical Providers Names – List of All Medical Providers Names - Horizontal
PL-DOC-LIST-HORIZ	Horisontal list of doctors
PL-HOSP-LIST-HORIZ	Horisontal list of hospitals
PL-MED-PRVD-LIST-HORIZ	Horisontal list of Medical providers
DEF-AUTO-MAKE	Defendant Vehicle - Make of Vehicle
REF-ATTY-LAST-NAME	Get referring attorney last name
REF-ATTY-FIRST-NAME	Get referring attorney first name
REF-ATTY-PREFIX	Get referring attorney prefix
DEF-ATTY-FIRM-PHONE	Defendant Law Firm - Phone
DEF-INS-FAX	Defendant insurance company - fax
DEF-ADJ-FAX	Defendant Adjuster - fax

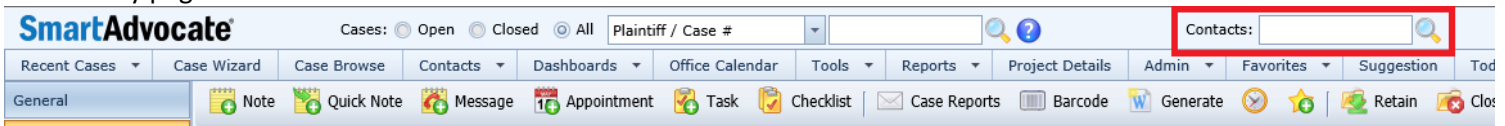
New/Updated Reports

- New Lien Report. Shows open cases with liens. Allows selection of lien type and staff.
- New Medical Records Request Report. Returns external medical records requests that are overdue to follow-up.
- New Adjourned/Canceled Appointments Report. Returns a list of appointments Adjourned or Canceled recently (specific number of day back) with reason.
- Calendar report now has “Days Forward” and “Days Backward” parameters, so you can subscribe to it.
- Calendar Report was enhanced to support entering dates in “Day” format (Days From, Days To). This allows creating Calendar Report subscriptions for desired number of days in the future.

Other Changes

- Critical Deadline types can be marked as inactive (Pick list Maintenance Admin page).
- Introduced User Preference to get notified when case gets closed or reassigned.
- Introduced User Preference to set default font parameters for new notes.
- Introduced User Preference to get notified when tasks created by user get completed.
- If documents are emailed from SmartAdvocate the list of documents will be visible in the email.
- System-wide settings that allow to show/hide “automatic” notes for tasks, negotiations, appointment creation and critical notes.

- Added Top Search for contacts. Now in addition to quickly finding case you can search contacts from the top of any page.



- Added Map feature to Contacts – Get directions to the Contact location from the office, from the Contact location to the office or view the Contact location on a map.

The screenshot shows the SmartAdvocate software interface with a contact information popup for Claude Simpson. The popup is titled "Contact Info" and contains the following information:

- Address:** 47 Main Street , Port Washington, NY 11050
- Phone #:** (718) 456-4123 - Home 1(P)
- Email:** iselizhuk@yourlawyer.com
- Website:** http://www.google.com
- Date of Birth:** SSN: - -

The popup also includes a "Map location" button and a dropdown menu with the following options:

- Map location
- Show directions to office
- Show directions from office

The background of the screenshot shows a "Staff" table with the following data:

Staff		
Attorney	Simpson, Claude	
Case Manager	Ramadan, Scherezada	
Primary Attorney	Selizhuk, Igor	
Primary Paralegal		

Below the staff table, there is a "Pending Activities" table with the following data:

Pending Activities		
10/13/2014	Motion -	

On the right side of the screenshot, there is a "Last Note (Adjuster)" table with the following data:

Last Note (Adjuster)		
		Send filed S
		Complaint to
		No-Fault Ph
		No-Fault Ph
05/12/2014	Discovery	

- Performance of Client Contact Overdue dashboard has been significantly improved.
- Two-way integration with QuickBooks. Please Note: - Professional service charges may apply for installation and configuration of this feature.
- Name format of the generated documents changed to contain case number, plaintiff name and template name. For example: 1017260_Gomez Jr._Melissa_REJECT-06.2_No_Injury_11_25_2014_10_19_32_AM.docx