

SmartAdvocate Release Notes (v2015.04.27)

These release notes cover changes made to SmartAdvocate software between December 2014 and April 2015.

Important Notes

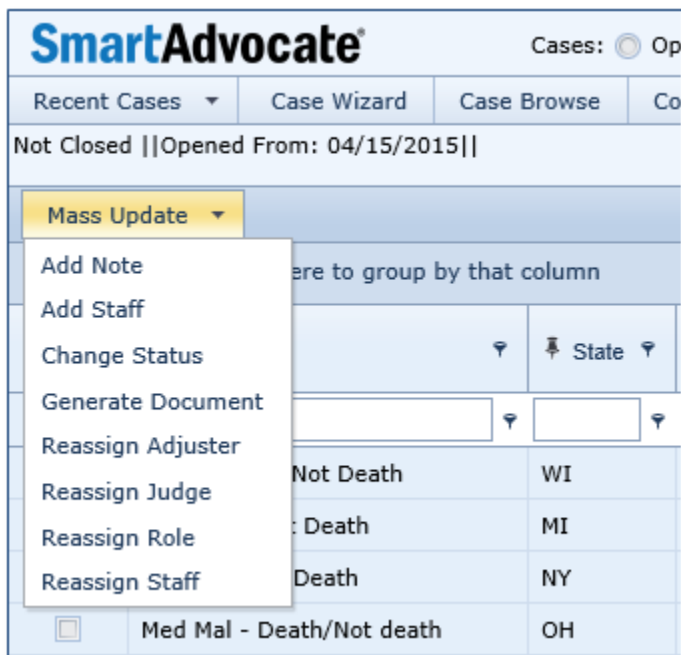
Starting from December 2014 release, **SmartAdvocate requires version 11 of Internet Explorer** running **without** Comparability Mode (for SmartAdvocate server). SmartAdvocate will work with earlier versions of Internet Explorer, but some of the pages/dialogs might not render correctly. See December 2014 release notes for details.

Starting from December 2014 release, **SmartAdvocate supports Google Chrome**. Note that working with documents in Chrome requires two components:

- Chrome Extension
<https://chrome.google.com/webstore/detail/sadocumentextension/ofcdbngfnpdlmdligcclbkihfbahdnph?hl=en-US>
- Document Launcher Application - SADocumentLauncher.exe , located on your server in the plugins directory. Check with your IT for the exact location and installation procedure.

Updated Pages - Description of Update/Change

- Case Browse Results - Mass Update on the Case Browse results page now has additional useful options. Now you can perform the following Mass Update operations - Add Note, Add Staff, Change Status, Generate Document, Reassign Adjuster, Reassign Judge, Reassign Role and Reassign Staff.

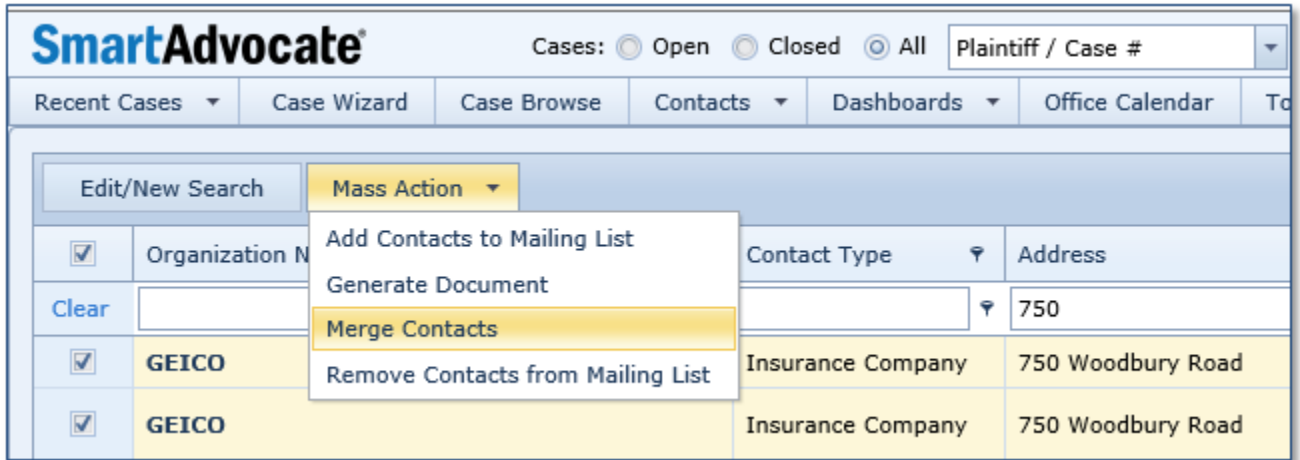


- Case Disbursements – Added Voided and Bill Received check statuses
- Case Disbursements –Voided checks will be excluded from Disbursements Summary

- Case Summary – Case Summary page now shows the 5 last Notes.

Last Notes		Add
Appointments - 04/13/2015 05:43:00 PM by Simpson, Claude We need to confirm the April 25th appointment.	 	↑
Plaintiff - Contacted - 04/10/2015 10:51:00 AM by Selizhuk, Igor Talked to Melissa about the case.	 	
Plaintiff - Left Electronic Message for Plaintiff - 04/10/2015 10:48:00 AM by Selizhuk, Igor Called Client – Left message on machine	 	↓

- Contacts List Page - You can now merge contacts (i.e. duplicate contacts) directly from the Contact Search results page.



The screenshot shows the SmartAdvocate interface. At the top, there are navigation tabs: Recent Cases, Case Wizard, Case Browse, Contacts, Dashboards, Office Calendar, and To. Below the tabs, there is a search area with 'Edit/New Search' and 'Mass Action' dropdown menus. The 'Mass Action' menu is open, showing options: 'Add Contacts to Mailing List', 'Generate Document', 'Merge Contacts' (highlighted), and 'Remove Contacts from Mailing List'. Below the menu is a table of search results:

<input checked="" type="checkbox"/>	Organization Name	Contact Type	Address
<input type="checkbox"/>			750
<input checked="" type="checkbox"/>	GEICO	Insurance Company	750 Woodbury Road
<input checked="" type="checkbox"/>	GEICO	Insurance Company	750 Woodbury Road

- Intake Follow-up & My Cases Dashboards – added right-click options to Attach Document(s) or Send Case Email directly from the Dashboard.

Add Critical Comment
Add Note
Add Quick Note
Attach Document(s)
Edit Status
Send Email

- New Case Wizard, Add New Contact - Ability to select employer organization for the contact was introduced. This also allows an individual contact to “inherit” address from the organization.

Add New Contact

Contact

Organization Individual Gender: * Male Female Unknown

Last Name: * Employee First Name: * Test

Middle Name: Nick Name:

Prefix: Suffix:

Organization: SmartAdvocate LLC

Phones

Primary

Originating () - x

Home Primary Phone () - x

Cell Phone () - x

Work Phone () - x

Address Use Organization Address

Address Type: From Organization

Address 1: 27300 Riverview Center E

Address 2:

ZIP: 34134

City: Bonita Springs

County: Lee

State: FL

Country: UNITED STATES OF AM

Comments:

Save

- Case Notes – you can now view the full note history (new item in the right-click menu). Note that only notes modified after this update will contain the full history. Notes modified before the update will only contain information about the last person who modified the note and modification timestamp.

Notes History

Date	Created/Modified By	Notes	Type
04/28/2015 2:16 PM	Selizhuk, Igor, Esq.	zxcl;hosdxzl;ZXzLJXzX:LZX:JzX:Kxz:Kxz:KlzX This doesn't make any sense. 4/27/2015 9:51 AM (Rahul): It does for me!	Phone Call
04/27/2015 11:24 AM	Selizhuk, Igor, Esq.	zxcl;hosdxzl;ZXzLJXzX:LZX:JzX:Kxz:Kxz:KlzX This doesn't make any sense. 4/27/2015 9:51 AM (Rahul): It does for me!	Plaintiff - Contacted
04/27/2015 9:51 AM	Doshi, Rahul	zxcl;hosdxzl;ZXzLJXzX:LZX:JzX:Kxz:Kxz:KlzX This doesn't make any sense. 4/27/2015 9:51 AM (Rahul): It does for me!	Plaintiff - Contacted
04/27/2015 9:50 AM	Selizhuk, Igor, Esq.	zxcl;hosdxzl;ZXzLJXzX:LZX:JzX:Kxz:Kxz:KlzX This doesn't make any sense.	Plaintiff - Contacted
04/01/2015 6:36 PM	Parker, Jerrold	zxcl;hosdxzl;ZXzLJXzX:LZX:JzX:Kxz:Kxz:KlzX	Plaintiff - Contacted

Page 1 of 1 (5 items) [1]




- Pick list maintenance – More options were added to the Pick list Maintenance page.





















































Pick List

Activity Codes

Activity Types
Adjourn/Cancel Reasons
Appeal Types
Case Close Reasons
Case Groups
Case Subtypes
Case Values
CaseType-ActivityCode Relatic
Client Contact Frequencies
Contact Number Types
Contact Types
Critical Deadline Types
Disbursement Types
Discovery Types
Expert Specialities
Expert Types
Fee Structures
Firm RelationShips
Insurance Types
Mailing Lists
Medical Provider Specialities
Medical Provider SubSpecialiti
Medical Visit Types
Merge Codes
Motion Types
Note Types
Prefixes
Provider Types
Report Types
Request Status
Roles
Stage Intervals
Status Intervals
Storage Location
Suffixes
Task Categories
Vehicle Makes
Vehicle Models

Add New Item

Export   

Activity Codes	Action
Administrative	 
Appearance	 
Court Appearance	 
Dep: Prep/Take/Defend	 
Depo: Prep/Take/Defend	 
Deposition: Prep/Take/Defend	 
Discovery	 
Doc Review	 
Document Review	 
Experts/Consultants	 
Law/Briefing	 
Lead/Liaison Duties	 
Litigation Strategy & Analysis	 
MDL Status Conf.	 
Other	 
Other/Misc	 
Other/Misc.	 
PEC Calls/Meeting	 
PEC Calls/Meetings	 
Pleadings/Briefs/Pre-trial Motions/Legal	 
PSC Calls/Meeting	 
PSC Calls/Meetings	 
Research	 
Science	 
Settlement	 
Trial Prep/Bellwether	 

- Plaintiff Employment – Redesigned employment page to increase functionality and streamline data entry
- Tools -> Document Templates – Added created and modified dates for templates

New Merge Codes Added

PL-ADJ-SALUTATION	plaintiff insurance adjuster's prefix
PL-EMAIL	Plaintiff Email
PL-PHONE#-CELL	Plaintiff Phone Cell
PL-DOC-ADDRESS-BLOCK	Doctor Address
PL-HOS-ADDRESS-BLOCK	Hospital Address
PL-NF-ADJ-PREFIX	No Fault Adjuster Salutation
DEF-ATTY-LIST-VERT-PHONE	Defendant List of All Full Name Vertical
PL-HOS-BILL-AMNT	Hospital Bill Amount
PL-HOS-BILL-ACCOUT#	Hospital Billing Account Number
PL-HOS-BILL-AMNT-PAID	Hospital Bill Paid Amount
PL-HOS-BILL-BALANCE	Hospital Bill Balance Due
PL-HOS-BILL-NUMBER	Hospital Bill Invoice/Account Number
PL-HOS-BILL-PROVIDER	Hospital Bill Provider Name
PL-HOS-BILL-SUBMITDATE	Date Hospital Bill Submitted
PL-DOC-BILL-AMNT	Doctor Bill Amount
PL-DOC-BILL-ACCOUT#	Doctor Billing Account Number
PL-DOC-BILL-AMNT-PAID	Doctor Bill Paid Amount
PL-DOC-BILL-BALANCE	Doctor Bill Balance Due
PL-DOC-BILL-NUMBER	Doctor Bill Invoice/Account Number
PL-DOC-BILL-PROVIDER	Doctor Bill Provider Name
PL-DOC-BILL-SUBMITDATE	Date Doctor Bill Submitted
PL-MED-PRVD-BILL-AMNT	Medical provider bill amount
PL-MED-PRVD-BILL-ACCOUT#	Medical Provider Billing Account Number
PL-MED-PRVD-BILL-AMNT-PAID	Medical Provider Bill Paid Amount
PL-MED-PRVD-BILL-BALANCE	Medical Provider Bill Balance Due
PL-MED-PRVD-BILL-NUMBER	Medical Provider Bill Invoice/Account Number
PL-MED-PRVD-BILL-PROVIDER	Medical provider Bill Provider Name
PL-MED-PRVD-BILL-SUBMITDATE	Date Medical provider Bill Submitted
PL-HOS-BILL-AMNT	Hospital Bill Amount
PL-HOS-BILL-ACCOUT#	Hospital Billing Account Number
PL-HOS-BILL-AMNT-PAID	Hospital Bill Paid Amount
PL-HOS-BILL-BALANCE	Hospital Bill Balance Due
PL-HOS-BILL-NUMBER	Hospital Bill Invoice/Account Number
PL-HOS-BILL-PROVIDER	Hospital Bill Provider Name
PL-HOS-BILL-SUBMITDATE	Date Hospital Bill Submitted
PL-DOC-BILL-AMNT	Doctor Bill Amount
PL-DOC-BILL-ACCOUT#	Doctor Billing Account Number
PL-DOC-BILL-AMNT-PAID	Doctor Bill Paid Amount
PL-DOC-BILL-BALANCE	Doctor Bill Balance Due
PL-DOC-BILL-NUMBER	Doctor Bill Invoice/Account Number
PL-DOC-BILL-PROVIDER	Doctor Bill Provider Name
PL-DOC-BILL-SUBMITDATE	Date Doctor Bill Submitted
PL-MED-PRVD-BILL-AMNT	Medical provider bill amount
PL-MED-PRVD-BILL-ACCOUT#	Medical Provider Billing Account Number
PL-MED-PRVD-BILL-AMNT-PAID	Medical Provider Bill Paid Amount
PL-MED-PRVD-BILL-BALANCE	Medical Provider Bill Balance Due

PL-MED-PRVD-BILL-NUMBER	Medical Provider Bill Invoice/Account Number
PL-MED-PRVD-BILL-PROVIDER	Medical provider Bill Provider Name
PL-MED-PRVD-BILL-SUBMITDATE	Date Medical provider Bill Submitted
DEF-ATTY-FOR-LIST-SINGLE-DEF	Defendant Law Firm List Vertical
DEF-ATTY-FOR-LIST-SINGLE-DEFLF	Defendant Law Firm List Vertical
DEF-ATTY-SIGN	Defendant Law Firm List Vertical
SOL-BP-DUE	Statute of Limitations BP/Interrogatories Due
SOL-BP-SERVED	Statute of Limitations BP/Interrogatories Served
DEF-DOB	Defendant Date Of Birth
ADDR-HORIZ	Liens Address line
COURT-FAX	Court Fax
CASE-OPENING-NUMBER	
RET-CLOSING-NUMBER	Closing Retainer Number
CASE-CLOSING-NUMBER	
PL-NF-INS-INSURED-ADDRESS-BLOCK	Plaintiff No Fault Insurance Insured Address Block
PL-NF-INS-INSURED-ADDRESS-HORIZ	Plaintiff No Fault Insurance Insured Address Block Horizontal
PL-NF-INS-INSURED-PHONE	Plaintiff No Fault Insured Phone
PL-NF-INS-INSURED-FAX	Plaintiff No Fault Insured Fax
PL-NF-INS-POLICY-START	Plaintiff No Fault Policy Start Date
PL-NF-INS-POLICY-END	Plaintiff No Fault Policy End Date
PL-NF-INS-POLICY-LIMIT-PP	Plaintiff No Fault Insurance Coverage Limit Per Person (Low)
PL-NF-INS-POLICY-LIMIT-PA	Plaintiff No Fault Insurance Coverage Limit Per Occurrence (High)
PL-NF-INS-POLICY-LIMITS	Plaintiff No Fault Insurance Coverage Limits
PL-INS-POLICY-LIMITS	Plaintiff Insurance Coverage Limits
PL-INS-POLICY-LIMIT-PP	Plaintiff Insurance Coverage Limit Per Person (Low)
PL-INS-POLICY-LIMIT-PA	Plaintiff Insurance Coverage Limit Per Occurrence (High)
DEF-INS-POLICY-LIMITS	Defendant Insurance Coverage Limits
DEF-INS-POLICY-LIMIT-PP	Defendant Insurance Coverage Limit Per Person (Low)
DEF-INS-POLICY-LIMIT-PA	Defendant Insurance Coverage Limit Per Occurrence (High)
DEF-INS-POLICY-START	Defendant Insurance Company Policy Start Date
DEF-INS-POLICY-END	Defendant Insurance Company Policy End Date
PL-INS-POLICY-START	Plaintiff Insurance Company Policy Start Date
PL-INS-POLICY-END	Plaintiff Insurance Company Policy End Date
PL-NF-INS-CLAIM#	Plaintiff No Fault Insurance Claim Number
PL-NF-INS-COV-AMT	Plaintiff No Fault Insurance Coverage Amount
PL-NF-INS-CITY-STATE-ZIP	Plaintiff No Fault Insurance City, State Zip
PL-NF-INS-NAME	Plaintiff No Fault Insurance Company Name
PL-NF-INS-POL#	Plaintiff No Fault Insurance Policy Number
PL-EMP-PHONE	Phone of Plaintiff Employer
COURT-JUDGE-LAST-NAME	Judge Last Name
COURT-JUDGE-FIRST-NAME	Judge First Name
PL-ADDRESS-HORIZ	Plaintiff Address Horizontal
FIRM-FOR-LIST-US	Case Firm Block with Parties we Represent
PL-DOB-YEAR	Plaintiff Date Of Birth
PL-INS-FAX	Plaintiff Insurance Company Fax
SOL-LAST-SERVICE-DATE	Most resent service date from all the SOLs of all defendants
DEF-ATTY-EMAIL	Defendant Attorney Email
CONT-LAST-NAME	Contact Last Name

Other Changes

- Introduced Integration with National Record Retrieval (<https://www.nationalrr.com/>). Now you can request records directly from Medical Provider Screen.

Medical Requests
 Show Active Requests Only
Export

Request ID	Request Date	Request Info	Completed @	Status	Status Date	FollowUp	Action
	03-20-2015	Doctors Records - No Fault requested for all dates up to 03/20/2015 by Krasnov, Andrey , assigned to Krasnov, Andrey		External 3rd Party	03-25-2015	04-02-2015	
	03-20-2015	Hospital Records - No Fault requested from 04/01/2013 to 03/20/2015 by Cicali, Joseph , assigned to		Internal	05-08-2015	05-08-2015	
..	03-20-2015	Billing Records requested to 03/20/2015 by Doshi, Rahul		External	03-20-2015	04-02-2015	
..	03-23-2015	Hospital Records requested from 04/03/2012 to 03/20/2015 by Claude, assigned to		External	03-25-2015	04-02-2015	
	03-26-2015	Hospital Records - No Fault requested from 04/01/2013 to 03/26/2015 by Cicali, Joseph		External	04-13-2015	04-02-2015	

Send Request

First
Melissa

Middle
H

Last
Gomez

Date of birth
01/27/1970

SSN
456-77-7666

Case
1017260

Patient Notes

#	Provider	Request Date
<input checked="" type="checkbox"/>	Biloxi Medical Center	03/20/2015
<input type="checkbox"/>	Day Op Center of Long Island Inc.	03/20/2015

Documents

Authorization - HIPPA Plaintiff; Medical Records Request - Doctor

[Authorization - HIPPA Plaintiff](#)

[Medical Records Request - Doctor](#)

Biloxi Medical Center

Records Types: Medical

Records Subtypes: Doctors records

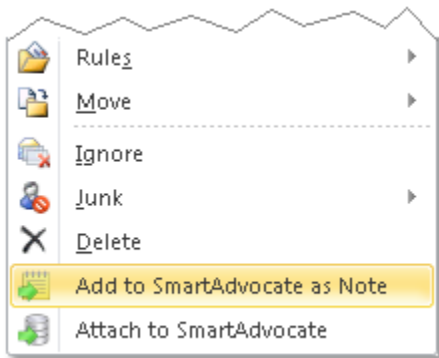
Comments: Need all available medical records.

Require certified records from provider Rush order

Send Cancel

- SmartAdvocate Login page can accept User Name and Password as part of the URL. Please note that this is, obviously, not a secure way to store your password and use of this feature is not recommended.
<http://servername/login.aspx?user=YourUserName&password=YourPassword>
- Performance (speed) of the Intake Follow-up & My Cases Dashboards was improved.

- The SmartAdvocate Outlook plugin now allows you to attach the text of an email as a SmartAdvocate Note.



- Outlook Plugin now remembers your last selection to attach email with files as a single email or as separate files.
- Added direction property for attachments from Outlook
- Outlook Add-In updated to check alphanumeric case number in email subject line
- PL-MRMRS merge code and relationships between contacts
- Added conflict checking for Appointments
- Improved layout on edit forms for Template Bundles and Builder Merge Codes
- Include ability to add Notes to Litigation Expert page
- Added ability to select from Defendant's check box for Insurance Companies
- Added ability to select from Plaintiff's check box for Insurance Companies
- Added fields to Insurance Company page
- Added Documents column to Expert Details and rearranged Disclosure Column
- Added Document Column in Investigations screen
- Added option to change the role for specific staff in multiple cases
- Added functionality to use system email as "from" address for Appointment Invites
- Added ability to cc a third person when assigning a task
- Added ability to generate mass mail for contacts
- Added ability to attach email as a Note in SmartAdvocate®
- Added ability to change the default Font Size/Type preference for Notes in User Profile
- Add ability to included Employer Details for individuals in Contact Card
- Added Adjourned/Cancelled information to Calendar and Appointment requests
- Added days of the week to Appointment dates
- Show Court dropdown if more than one court in appointment location when scheduling appointments
- Added Predefined Notes for Appointments and critical comments
- Added export option and export and email to Notes Search
- Added forwarding option for SmartAdvocate email
- Added new column for Confirmed Amount in Liens screen
- Added ability to enter comments in Medical Requests screen
- Contact card shows employer address by default with "From Organization" address type
- Lien Tracking – "Save & Add Lien" updated to say "Save & Edit"
- Change and updated address format
- Injuries Screen – Auto Populate append text instead of replacing it