

SmartAdvocate Release Notes (v2018.08.10)

These release notes cover over 1,000 updates and new features added to the SmartAdvocate software between October 2017 and August 2018.

Important Notes

Important Note: Starting July 9th 2019 Microsoft will no longer support Microsoft SQL 2008 R2. Accordingly, SmartAdvocate will no longer support firms using Microsoft SQL 2008 R2 after July 9th 2019. Further, some SmartAdvocate features that utilize more current Microsoft SQL code will not work on Microsoft SQL 2008 R2. We strongly suggest you update your servers to at least Microsoft SQL 2012 and preferably Microsoft SQL 2017 prior to July 2019. All clients using the SmartAdvocate Cloud version are already operating on the most current version of Microsoft SQL

This release of SmartAdvocate, like so many of our past releases, introduces hundreds of changes (this one actually has over 1,000) that will make your practice more productive and efficient.

Here are some of the highlights:

- Support for merge codes in Microsoft Word's Formula and If fields of was added. This addition will allow you to have conditional statements in your Word document templates to insert different text based on merge codes values. You will also be able to add formulas that use merge codes in calculations.
- Support for Excel templates was added. Now you will be able to merge Excel spreadsheets the same way you merge Word documents.
- Document Search Report – New report added to enable subscription functionality searches for documents, similar to Tools -> Document Search. This report enables you to create subscriptions that will, for example, give you a list of all Medical Records added to your cases this week.
- Case Documents now can be organized into Custom Document Folders
- General – Negotiation/Settlement – Added ability to track all Settlement and Settlement Distribution checks.
- Case Monitor Widget – new component that allows you to monitor automatically created cases that have not been personally handled by office staff yet i.e. cases that came in thru Chat, web, answering service. Widget is designed to stay in the corner of a computer monitor so it's always visible so these types of cases do not fall thru the cracks. It will also display manually created cases that have no comments other than the first automatic case creation comment.
- Left Menu - Other – “Case Value” – new page added. This is a view only page that shows financial information from several other pages (Disbursements, Liens, Lost Wages, Medical Provider, Other Provider and Vehicle) and provides totals to various columns.
- Ability to select multiple case subtypes was introduced.
- Support for different user interface themes/look and feel for all SmartAdvocate pages.
- Setting to allow staff member to have different roles in the same case.
- Client Portal
- New Workplan Designer “Beta”
- Automated Campaigns. For example, send a client text message (SMS) or email when their Case Status changes; send the client s SMS reminding them of an appointments with a doctor or their attorney – can send multiple reminders i.e. 24 hours prior and 3 hour prior; generate a letter to the client when their Case Status changes; create a Task when a case is in a Status for a certain period of time.
- Updates with new features to the iPhone, iPad and Android app
- Support for Tab name templates.

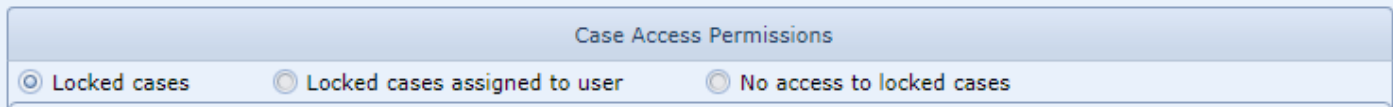
Integrations New and Previously Available

- **ApexChat** – Website Chat Service. Get new cases created from ApexChat leads automatically.
<https://www.apexchat.com/>
- **Deitz Court Reporting** – Court reporting services. Receive deposition transcripts directly in SmartAdvocate.
<http://deitzcourtreporting.com/>
- **Diamond Reporting & Legal Video** – Court reporting services. Receive deposition transcripts directly in SmartAdvocate.
<http://www.diamondreporting.com/>
- **eLaw** – eDocket, eCalendaring, Calendar e-watching and e-copying Service. Get court appointments directly to your SA (and Outlook) calendar.
<http://www.e-law.com/>
- **Intake Conversion Experts** - Experts in Legal Intake and Lead Conversion. Get new SmartAdvocate cases created from ICE leads automatically.
<http://intakeconversion.com>
- **inSync** –<http://www.insynclitigation.com/>
- **Legal Intake Professionals** – Legal Answering Service & More. Get new cases created from LIP leads automatically.
<http://www.legalintake.com/>
- **MessageMedia** – Texting Service. Send and receive text messages directly in SmartAdvocate.
<http://www.messagemedia.com/>
- **National Record Retrieval** – Medical Records Retrieval Service. Request medical records directly from SA and get the received records automatically sent to SA.
<https://www.nationalrr.com/>
- **Ngage** – Website Chat Service. Get new cases created from Ngage leads automatically.
<http://www.ngagelive.com/>
- **Persist** – Automated Lead Communications Service. Follow-up on your leads using automatic calling, IVR, voicemails, email and text. Fully integrated with SmartAdvocate’s contacts, cases and statuses.
<http://forpersist.com/>
- **PM Legal** – Litigation Support Service. Handle trial prep, process service, investigations, surveillance and statements. Processes summons & complaints, affidavits of service, index numbers and more. Get documents and bills directly to you and automatically uploaded to SA. Get index number directly into SA.
<http://www.pmlegal.com/>
- **QuickBooks** – Accounting Software. Two-way synchronization for case disbursements (expenses).
- **Ring Central** – Phone System. Click-to-dial and screen-pop supported with Ring Central client software running on workstation. Texting is also supported. Send and receive text messages directly in SmartAdvocate.
- **XeeBee** - Medical Records Retrieval Service. Request medical records directly from SA and get the received records automatically sent to SA.
<https://xeebee.com/>

Note that most of the available integrations have a \$1,000 installation and configuration fee as well as 3rd party fees associated with them.

Updated Pages

- Admin – Case Types – Set to show only Active case types by default.
- Admin – Document Templates – Added support for Excel templates. Currently there is no Template Editor for Excel, so you would need to copy/paste merge codes from Word templates.
- Admin – Notifications Setup – Added option to set Critical Deadlines and SOLs pushed to external calendars as All Day events. Added “Show as” option (Free/Busy).
- Admin – Picklist Maintenance – Added ability to automatically update records that were using the item that is being deleted. Deleted item will be replaced with the item of user’s choice. Note: This feature is supported for many, but not all of the picklist items.
- Admin – User Permission Groups – Added options to allow users to access locked cases assigned to them.



The screenshot shows a settings panel titled "Case Access Permissions". It contains three radio button options: "Locked cases" (which is selected), "Locked cases assigned to user", and "No access to locked cases".

- Barcode Page – Page was updated to automatically include Firm’s name with Powered by SmartAdvocate logo.
- Case Browse – Added availability of new columns:
 - Defendant Address
 - Defendant City
 - Defendant State
 - Defendant Zip
 - Next Deadline/SOL Type
 - Next Critical Deadline
 - Next Critical Deadline Type
 - Next SOL
 - Next SOL Type
 - Next Defendant SOL
 - Next Defendant SOL Type
 - Next Plaintiff SOL
 - Next Plaintiff SOL Type
 - Other Plaintiffs
 - Plaintiff Address
 - Plaintiff City
 - Plaintiff State
 - Plaintiff Zip Code
 - Settled/Not Settled
 - Settlement Date (First)
 - Settlement Amount (Total)
 - Verdict (Total)
- Case Browse Results – Added ability to show Plaintiff’s addresses on the Map Dashboard.
- Case Browse Results – Reassign Staff – Added option to reassign Task, Appointments and Medical Records Requests without reassigning Cases. Added option to mass send Invites/Cancel in case of mass Appointment

reassignment.

Reassign Staff

From: [dropdown] To: [dropdown]

Comments: Bulk change

Reassign Case Staff

Reassign Tasks

Reassign Appointments

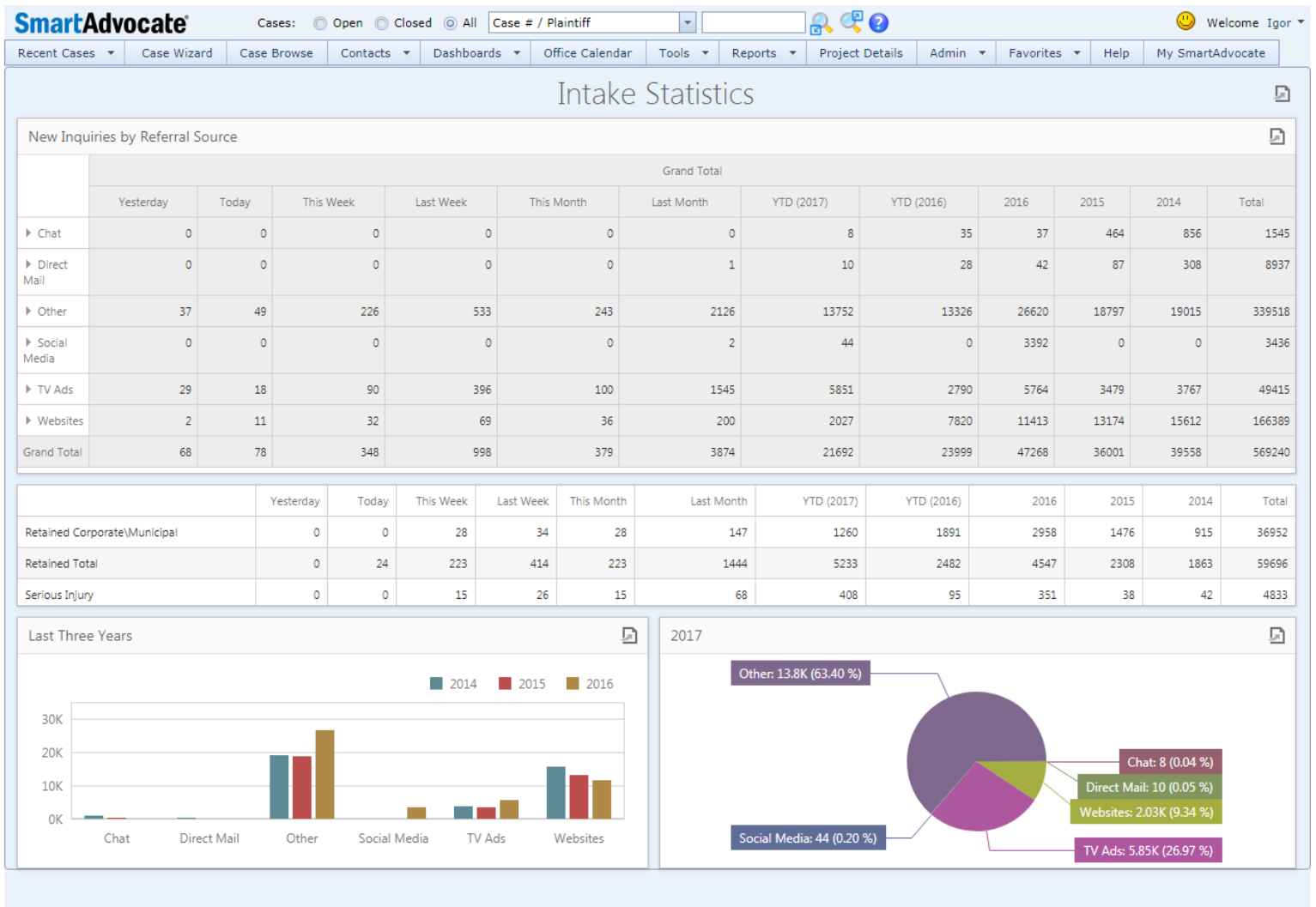
Reassign Medical Records Requests

Send Invite/Cancel Requests

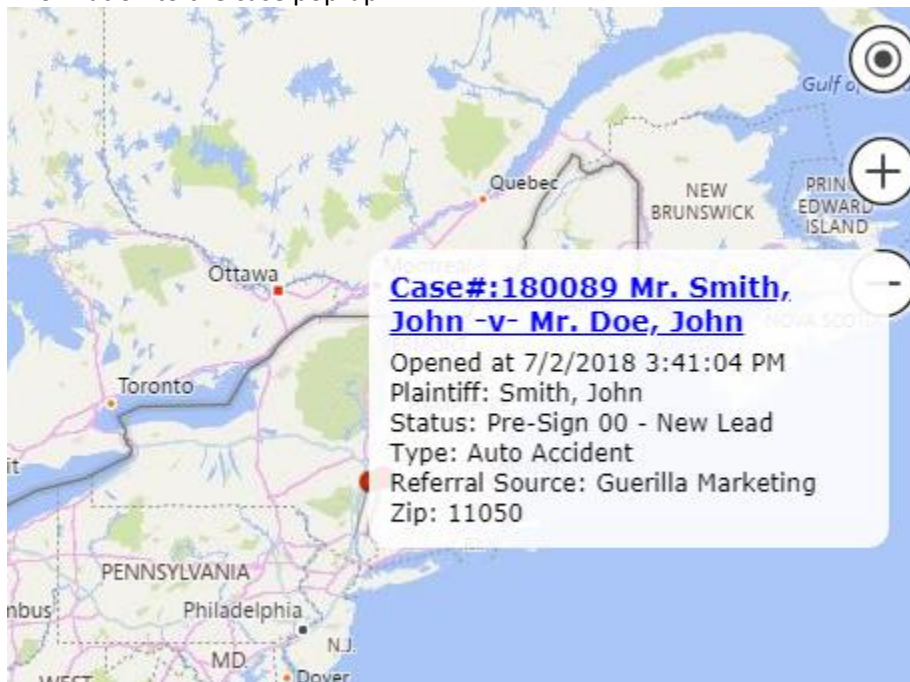
Reassign Staff Cancel

- Contact Card – Added field for EIN number.
- Contact Card – Added dropdown for Race. Values for the dropdown can be controlled from the Picklist Maintenance page.
- Contact Card – Added Settlement column in the “Cases and Related Contacts Tab” and ability to filter cases by Open/Closed status on the Contact Cases grid.
- Contacts – Contact Search – Added fields for phone number and email address search. Added checkbox to exclude Allow Mailing (to allow users to pull a list of all Prevent Mailing contacts).
- Dashboards – Client Contact Overdue – Show primary contact information instead of primary plaintiff information.
- Dashboards – Intake Follow Up Dashboard – Added “Open Calendar Items” column.
- Dashboards – Intake Review – Added Referral Source information to the grid.

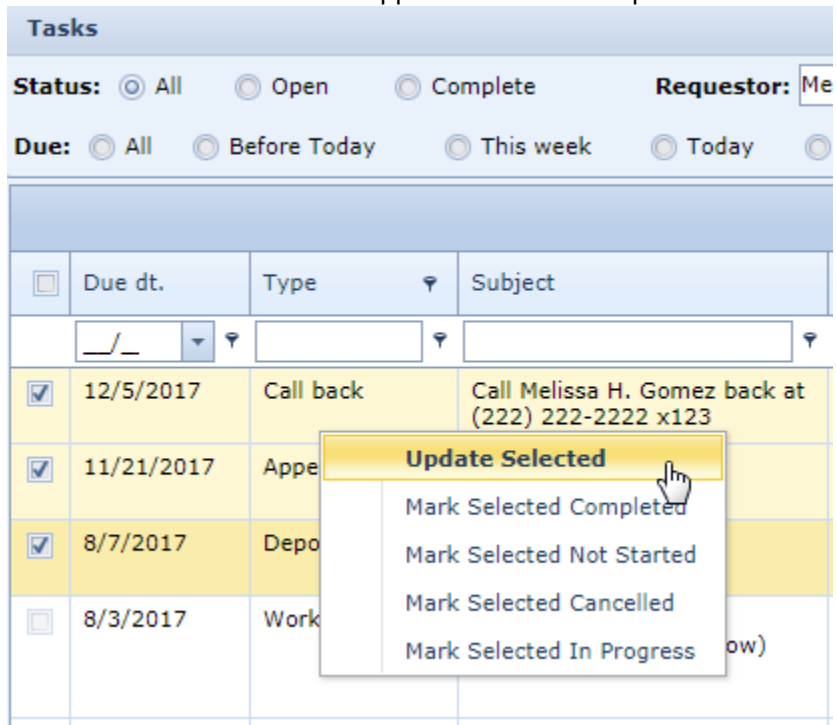
- Dashboards – Intake Statistics – New Dashboard added.



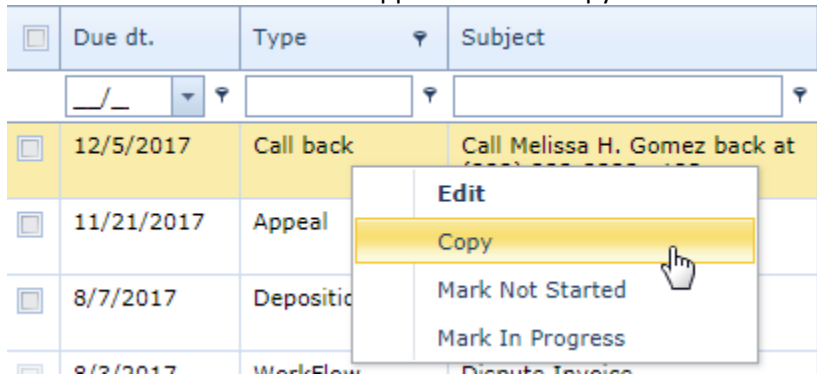
- Dashboards – Map Dashboard – Added “Show Only Open Cases” filter. Added Status, Case type and Referrer information to the case pop-up.



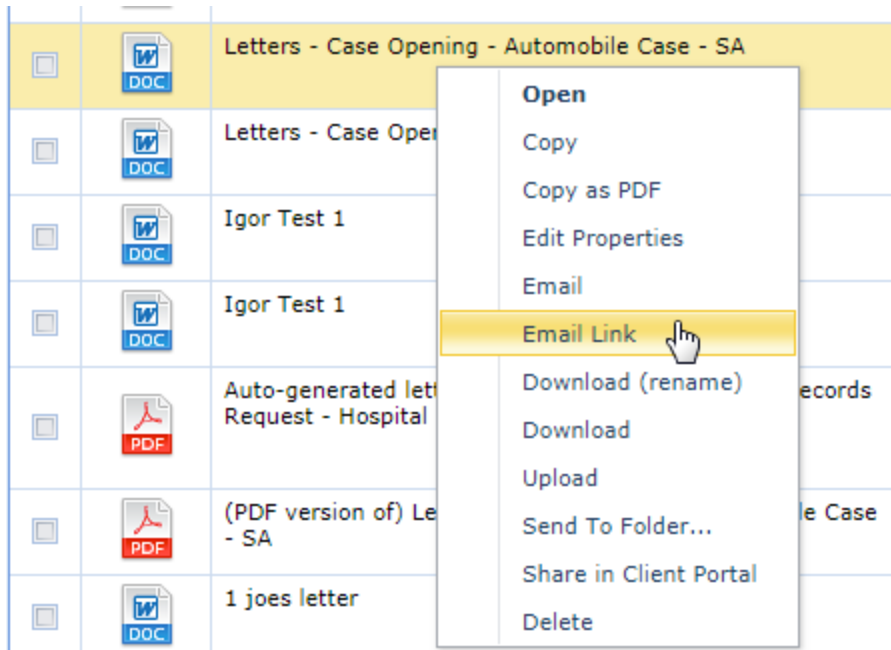
- Dashboards – My Cases – Added “Open Calendar Items” column.
- Dashboards – Presign - Signup Not Scheduled – Added Referral Source column.
- Dashboards – Settlement/Fee Production – Added filters for Case Type and Settlement Type.
- Dashboards – Tasks – Added Case Type and Start Date columns.
- Dashboards – Tasks – Added support for mass task update.



- Dashboards – Tasks – Added support for Task Copy.

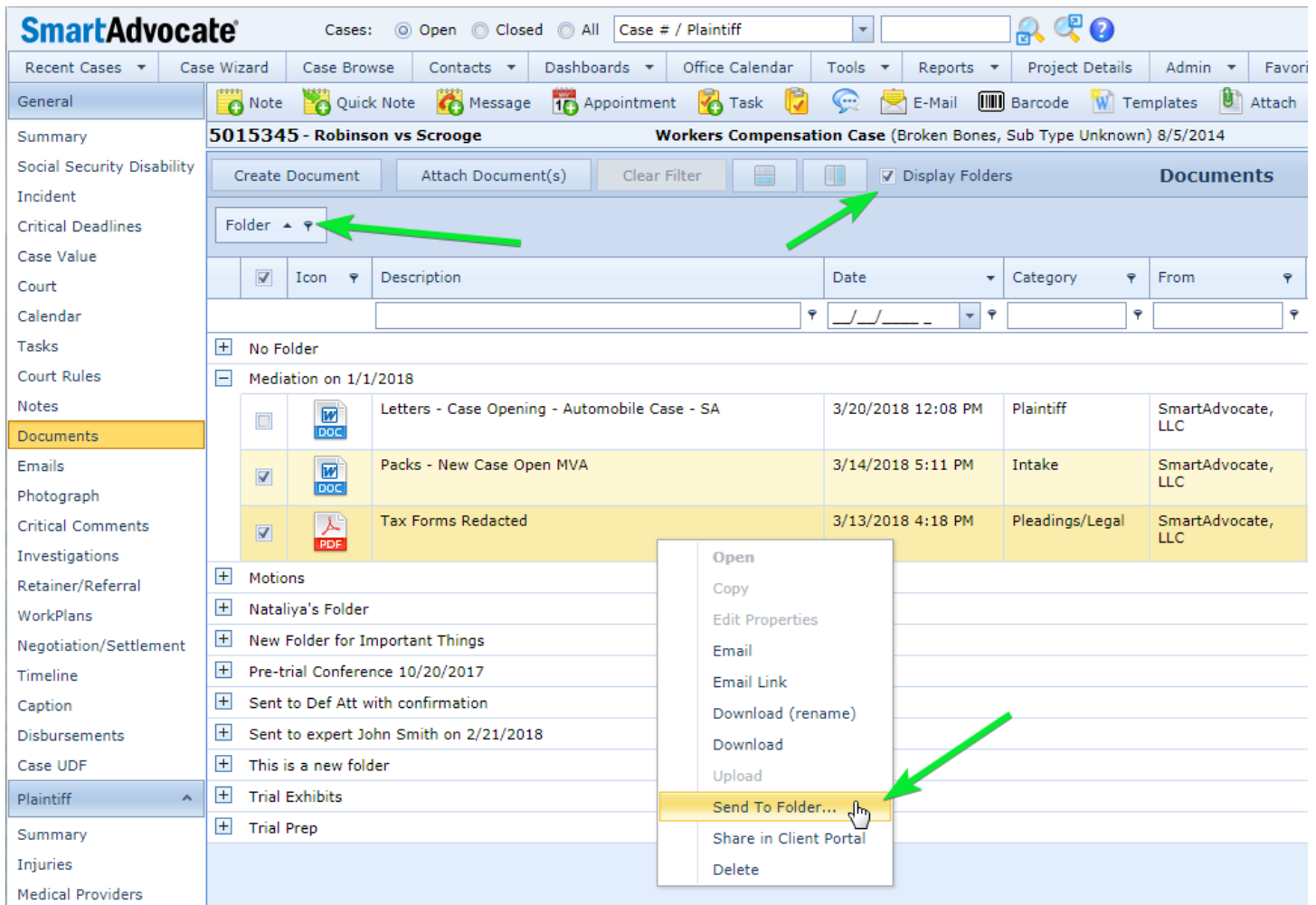


- Defendant – Attorneys – Added Ability to edit multiple records.
- Defendant – Insurance – Added fields to specify deductible limits. Added Ability to edit multiple records.
- General – Court –Alert was added if the same docket exists in another case.
- General – Critical Comments – Added “Do not show after” option. If “Do not show after” date is entered Critical Comment will not be shown after that date.
- General – Disbursements – Added Status Date column.
- General – Documents - Added Comments field.
- General – Documents - Added ability to send SA link to a document. When clicked this link opens Documents page of the case and shows only this particular document.



Those links can also be inserted into Notes by using "Insert Text" function.

- General – Documents - Added ability to associate a custom folder to case document(s). Folders are case specific and users can switch between grid view and folder view.



- General – Document Generation – Added requirement to explicitly confirm that the address of the Plaintiff with "Prevent Mailing" on can be used in document creation. Same logic is enabled for Incompetent, Minor and Deceased plaintiffs.

Generate document(s) for case : Case Number: 5015345

Document Description:
Letters - Case Opening - Automobile Case - SA

Comments:

From: SmartAdvocate, LLC To: Our Firm

Select Plaintiff:

- Terry-Ann I. Robinson - (P)-Victim (Prevent Mailing Enabled)
- CLAUDE R. SIMPSON - (P)-Estate Admin.
- Marie Jane - (P)-Victim (Prevent Mailing Enabled, Deceased)

Select Plaintiff Address:

- Ignore Prevent Mailing
- 12345 main street, Las Vegas, NV 89145 (Primary & Mailing Address)
- 621 Greatview Avenue, Chappaqua, NY 10514 (Mailing Address)
- 1622 West Neill Parkway, White Plains, NY 10601

Keep Merge Codes with Empty Values

Generate Generate & Close Check Merge Codes Cancel

Selected template : Letters - Case Opening - Automobile Case - SA.docx

- General – Emails – New page added to show only Emails from the Documents page. Visibility of Emails on the Documents page can be controlled via User Preferences or from the page itself.
- General – Negotiation/Settlement – Added ability to track all Settlement and Settlement Distribution checks.

Settlements										
Date	Plaintiff	Settled by	Settlement With	Amount Received	Settlement	Firm Fee	Amount Distributed			
7/10/2018	All	Vogelsberg, Karl	Ins. Company: GEICO Type: Commercial \$10,000,000/\$100,000,000 Defendant: Eli Lilly Claim #: 0987654321 Adjuster: Kramer, Paula, Tel. (800) 861-8380	\$1,000,000.00	\$1,000,000.00	\$266,666.66	\$1,000,000.00 (multiple dates)			

Checks										
Date	Amount	Credit	Debit	Balance	Status	Payee	Check #	Type		
Settlement	\$1,000,000.00	\$1,000,000.00		\$1,000,000.00				Settlement		
Distribution	7/10/2018	(\$800.00)	\$800.00	\$999,200.00	Hold	Third Party Adjusters, LLC		Lien		
Distribution	7/10/2018	(\$2,500.00)	\$2,500.00	\$996,700.00	Hold	Abbeville General Hospital		Lien		
Distribution	7/10/2018	(\$2,654.11)	\$2,654.11	\$994,045.89	Hold	12 Oaks Hospital		Lien		
Distribution	7/10/2018	(\$5,500.00)	\$5,500.00	\$988,545.89	Hold	Twenty First Century Legal Funding		Lien		
Distribution	7/10/2018	(\$535.00)	\$535.00	\$988,010.89	Hold	Abbeville General Hospital		Medical Bills		
Distribution	7/10/2018	(\$350.35)	\$350.35	\$987,660.54	Hold	12 Oaks Hospital		Medical Bills		
Distribution	7/10/2018	(\$5,357.17)	\$5,357.17	\$982,303.37	Hold	SmartAdvocate, LLC		Disbursements		
Distribution	7/10/2018	(\$66,666.67)	\$66,666.67	\$915,636.70	Hold	Third Party Adjusters, LLC				
Distribution	7/10/2018	(\$266,666.66)	\$266,666.66	\$648,970.04	Hold	SmartAdvocate, LLC		Firm Fee		
Distribution	7/10/2018	(\$280.01)	\$280.01	\$648,690.03	Hold	SmartAdvocate, LLC		Interest On Disbursement		
Distribution	7/10/2018	(\$648,690.03)	\$648,690.03	\$0.00	Hold	Montgomery, Colin		Plaintiff		
		\$0.00	\$1,000,000.00	\$1,000,000.00						

- General – Negotiation/Settlement – Added Settlement calculator on the Negotiation dialog:

Settlement Calculation Based on the Offer

Disbursements	\$7.99	
Net	\$999,992.01	
Gross Attorney Fee	1/3	from <input type="radio"/> Gross <input type="radio"/> Net
	\$333,333.33	<input type="radio"/> Amount
Prior	\$11.12	
Referrer	\$898.34	
Other	\$1,527.16	
Firm Fee	\$330,896.71	
Liens	\$0.00	
Medical Bills	\$0.00	
Interest on Disbursements	\$0.00	0%
<hr/>		
Net To Client	\$666,658.68	

- General – Retainer/Referral – Added fields to specify Alternative Fee:

Retainer Fee: Percentage 1/3 Gross Net
 Amount

Alternative Fee: Condition Met: Condition: If the case goes into Litigation
 Percentage 40% Gross Net
 Amount

- General – Summary – Added ability to add same staff member in different roles. This option is turned off by default to preserve original behavior and can be enabled in the System Parameters.

Administrator Parameters Setup		
Drag a column header here to group by that column		
Group Description	Parameter Description	Selected Value
	allow staff	
Staff	Allow staff member to have different roles in the same case	False

- General – Summary – Added "Law Firm" column to Plaintiffs grid.

- General – Tasks – Added Task History functionality.

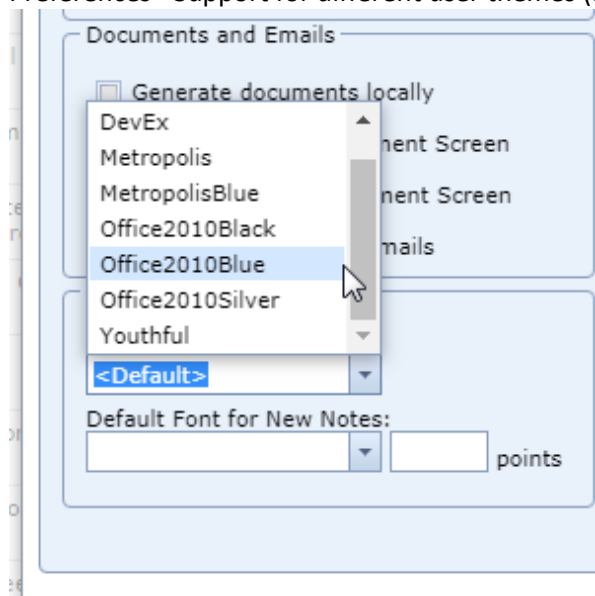
Record History			
Change Date	User Name	Event Name	Change Details
7/5/2018	Selizhuk, Igor V., Esq.	Modified	Category: Call back Status: In Progress -> Completed Subject: Call Katya Ivanov back at (267) 772-1811 Due Date: 6/11/2018 Assigned To: Selizhuk, Igor V., Esq.
7/5/2018	Selizhuk, Igor V., Esq.	Modified	Category: Call back Status: Not Started -> In Progress Subject: Call Katya Ivanov back at (267) 772-1811 Due Date: 6/11/2018 Assigned To: Krasnov, Yana -> Selizhuk, Igor V., Esq.
6/11/2018		Modified	Category: Call back Subject: Call Katya Ivanov back at (267) 772-1811 Due Date: 6/11/2018 Assigned To: Krasnov, Yana
6/11/2018	Krasnov, Yana	Created	Category: Call back Priority: High Status: Not Started Subject: Call Katya Ivanov back at (267) 772-1811 Start Date: 6/11/2018 Due Date: 6/11/2018 Time Spent: 0 h Description: testing Requestor: Krasnov, Yana Assigned To: Krasnov, Yana

Close

- General – Timeline – Added Case creation and Case Type changes information. Added history for the following information:
 - Critical Comments
 - Disbursements
 - Liens
 - Medical Bills
 - Medical Payments
 - Medical Providers
 - Medical Visits

- Litigation – Hearing – New page was added to track Hearings.

- Litigation – Motions – Page was significantly redesigned.
- Plaintiff – Attorneys – Added Ability to edit multiple records.
- Plaintiff – Insurance – Added fields to specify deductible limits. Added Ability to edit multiple records.
- Plaintiff – Lien Tracking – Added Date Release Received field.
- Plaintiff – Medical Provider – Added ability to save a Visit and add a Task based on the Visit information.
- Plaintiff – Medical Provider – Added ability to associate a document with a Medical Records Request.
- Plaintiff – Medical Provider – Changing Medical Request Status will automatically update Status Date.
- Plaintiff – Medical Provider – Medical Records Request Generation dialog will now remember checked checkboxes.
- Preferences - Support for different user themes (appearance of screens) was added.



System-wide default can be set in the System Parameters.

- Tools – Case Menu Configuration – Added “Rename” button (instead of the right-click).



- Tools – Documents Search – Added “Document Type” and “Origin” columns.
- Tools – Mass Emailing – Added option to exclude contacts with Prevent Mailing set as well as Deceased, Incompetent and Infants.
- Tools – Mass Mailing – Added SSN and Address3 columns.
- Tools – Mass Texting – Added option to exclude contacts with Prevent Mailing set as well as Deceased, Incompetent and Infants.
- Tools – Mass Time Tracking Entry – New page was added. This page allows to enter time spent on multiple cases on a single page.
- Office Calendar – Added ability to select location from list of contacts that are added in the admin section as “available for all cases”.
- Other – Case Value – new page added. This is a view only page that shows financial information from several other pages (Disbursements, Liens, Lost Wages, Medical Provider, Other Provider, Vehicle).
- Other – Time Tracking – Added Invoice Number, Status Date and Invoice Date fields.

Document Merging Improvements and New Merge Codes Added

- In the last SmartAdvocate release we added number of merge codes that can add signature of the staff member, for example CA-ATTY-SIGN will insert into that document the attorney's signature (from the contact card that contains signature of the case attorney). This release adds PL-SIGN merge code. Plaintiff's signature can be captured on the iPad using Investigator module of the SmartAdvocate App and is stored on the contact card.
- Dynamic merge codes MED-PRVD-ADDRESS-BLOCK and MED-PRVD-PHONE were added. With those codes you will be able to select address or phone based on the type.

Phone Numbers						Add Contact Number
Phone Type	Contact #	Ext	Text	Primary	Action	
Office Phone	(602) 555-7200			Yes		
Billing Department	(212) 555-1234					
Records Department	(212) 555-4567					

- Support for merge codes in "Formula" and "If" fields of Microsoft Word was added.
- Support for table merge codes in the email templates was added.
- Admin parameter to specify the text of the paragraph for MED-REQUEST-2ND-REQUEST was added.

The screenshot shows the 'Administrator Parameters Setup' window. It features a table with the following columns: Group Description, Parameter Description, Selected Value, and Actions. A row is selected with '2nd' in the Parameter Description column. The description for this parameter is: 'Paragraph that will be used when generating text for MED-REQUEST-2ND-REQUEST merge code'. A detailed note is visible below the table: 'On LATEST_REQUEST_DATE, we requested a copy of our client's medical records as specified below. As of this date, however, we have not received a response from you. Kindly process our request by sending us a pre-pay bill detailing any charges involved. Thank you.'

APPMNT-NEXT-CASE-COMMENTS	Next Case Appointment Comments
APPMNT-NEXT-CASE-DATE	Next Case Appointment Date
APPMNT-NEXT-CASE-LOCATION	Next Case Appointment Location
APPMNT-NEXT-CASE-SUBJECT	Next Case Appointment Subject
APPMNT-NEXT-CASE-TIME	Next Case Appointment Time
APPMNT-NEXT-CASE-TYPE	Next Case Appointment Type
APPMNT-NEXT-CONTACT-COMMENTS	Next Contact Appointment Comments
APPMNT-NEXT-CONTACT-DATE	Next Contact Appointment Date
APPMNT-NEXT-CONTACT-LOCATION	Next Contact Appointment Location
APPMNT-NEXT-CONTACT-SUBJECT	Next Contact Appointment Subject
APPMNT-NEXT-CONTACT-TIME	Next Contact Appointment Time
APPMNT-NEXT-CONTACT-TYPE	Next Contact Appointment Type
APPMNT-NEXT-PLAINTIFF-COMMENTS	Next Plaintiff Appointment Comments
APPMNT-NEXT-PLAINTIFF-DATE	Next Plaintiff Appointment Date
APPMNT-NEXT-PLAINTIFF-LOCATION	Next Plaintiff Appointment Location
APPMNT-NEXT-PLAINTIFF-SUBJECT	Next Plaintiff Appointment Subject
APPMNT-NEXT-PLAINTIFF-TIME	Next Plaintiff Appointment Time

APPMNT-NEXT-PLAINTIFF-TYPE	Next Plaintiff Appointment Type
CA-ATTY-ADDRESS-BLOCK-NO-NAME	Case Attorney Address Block without name
CA-ATTY-PHONE#-CELL	Case Attorney Cell Phone Number
CA-CM-PHONE#-CELL	Case Manager Cell Phone Number
CA-ENTITY-ADDRESS-BLOCK-WITH-EMPLOYER	Case Contacts Address Block with Employer
CA-EXPECTED-RES-DATE	Case Expected Resolution Date
CA-NUMBER-LINK	Link to Case in SmartAdvocate
CA-PARA-PHONE#-CELL	Case Paralegal Cell Phone Number
CA-PARTY-ADJ-ADDRESS-BLOCK	Case Party Adjuster Address block
CA-PARTY-ADJ-ADDRESS-BLOCK-NO-NAME	Case Party Adjuster Address Block without name
CA-PARTY-ADJ-ADDRESS-HORIZ	Case Party Adjuster Address Horizontal
CA-PARTY-ADJ-EMAIL	Case Party Adjuster Email
CA-PARTY-ADJ-FAX	Case Party Adjuster fax
CA-PARTY-ADJ-FIRST-NAME	Case Party Adjuster First Name
CA-PARTY-ADJ-HE-SHE	Case Party Adjuster He or She
CA-PARTY-ADJ-INS-ADDRESS-BLOCK	Case Party Adjuster's Address Block with Insurance Name
CA-PARTY-ADJ-INS-ADDRESS-BLOCK2	Case Party Adjuster's Address Block with Insurance Name
CA-PARTY-ADJ-LAST-NAME	Case Party Adjuster Last Name
CA-PARTY-ADJ-MIDDLE-NAME	Case Party Adjuster Middle Name
CA-PARTY-ADJ-NAME	Case Party Adjuster Full Name
CA-PARTY-ADJ-PHONE#	Case Party Adjuster Phone Number
CA-PARTY-ADJ-PREFIX	Case Party Adjuster Prefix
CA-PARTY-INS-ADDR1	Case Party Insurance Address Line 1
CA-PARTY-INS-ADDR2	Case Party Insurance Address Line 2
CA-PARTY-INS-ADDR3	Case Party Insurance Address Line 3
CA-PARTY-INS-ADDRESS-BLOCK	Case Party Insurance Address Block
CA-PARTY-INS-ADDRESS-BLOCK-HORIZ	Case Party Insurance Address Block Horizontal
CA-PARTY-INS-ADDRESS-BLOCK-NO-NAME	Case Party Insurance Address Block without name
CA-PARTY-INS-CITY	Case Party Insurance City
CA-PARTY-INS-CITY-STATE-ZIP	Case Party Insurance Address City, State Zip
CA-PARTY-INS-CLAIM#	Case Party Insurance Claim Number
CA-PARTY-INS-CNTY	Case Party Insurance County
CA-PARTY-INS-COMMENT	Case Party Insurance Comment
CA-PARTY-INS-CONTACT-NAME	Case Party Insurance Contact Full Name
CA-PARTY-INS-COV-AMT	Case Party Insurance Coverage Amount
CA-PARTY-INS-COV-TYPE	Case Party Insurance Coverage Type
CA-PARTY-INS-DED-AMT	Case Party Insurance Deductible Amount
CA-PARTY-INS-FAX	Case Party Insurance Fax
CA-PARTY-INS-GROUPNUMBER	Case Party Insurance Group Number
CA-PARTY-INS-IDNUMBER	Case Party Insurance ID Number
CA-PARTY-INS-INSURED-NAME	Case Party Insurance Insured Full Name

CA-PARTY-INS-NAME	Case Party Insurance Name
CA-PARTY-INS-OTHER-NAME	Case Party Insurance Other Name
CA-PARTY-INS-PHONE#	Case Party Insurance Phone Number
CA-PARTY-INS-POLICY#	Case Party Insurance Policy Number
CA-PARTY-INS-POLICY-END	Case Party Insurance Policy End Date
CA-PARTY-INS-POLICY-LIMIT-PA	Case Party Insurance Coverage Limit Per Occurrence (High)
CA-PARTY-INS-POLICY-LIMIT-PP	Case Party Insurance Coverage Limit Per Occurrence (Low)
CA-PARTY-INS-POLICY-LIMITS	Case Party Insurance Coverage Limits
CA-PARTY-INS-POLICY-START	Case Party Insurance Policy Start Date
CA-PARTY-INS-STATE	Case Party Insurance State
CA-PARTY-INS-UND-POL-LIM	Case Party Insurance Underinsurance Policy Limit
CA-PARTY-INS-ZIP	Case Party Insurance Zip
CA-PRIMARY-CONT-HE-SHE-IT	Case Primary Contact He, She Or It
CA-PRIMARY-CONT-HIM-HER-IT	Case Primary Contact Him, Her Or It
CA-PRIMARY-CONT-HIS-HER-ITS	Case Primary Contact His, Hers Or Its
CA-PRIMARY-PL-HE-SHE-IT	Primary Plaintiff He, She Or It
CA-PRIMARY-PL-HIM-HER-IT	Primary Plaintiff Him, Her Or It
CA-PRIMARY-PL-HIS-HER-ITS	Primary Plaintiff His, Hers Or Its
CA-STAFF-ADDR1	Case Staff Address1
CA-STAFF-ADDR2	Case Staff Address2
CA-STAFF-ADDR3	Case Staff Address3
CA-STAFF-ADDRESS-BLOCK	Case Staff Address Block
CA-STAFF-ADDRESS-BLOCK-NO-NAME	Case Staff Address Block without name
CA-STAFF-ADDRESS-HORIZ	Case Staff Address Horizontal
CA-STAFF-CITY	Case Staff City
CA-STAFF-CITY-STATE-ZIP	Case Staff City State Zip
CA-STAFF-FAX	Case Staff Fax
CA-STAFF-INIT	Case Staff Initial
CA-STAFF-PHONE#-CELL	Case Staff Cell Phone Number
CA-STAFF-STATE	Case Staff State
CA-STAFF-ZIP	Case Staff Zip
CA-TIME-SUMMARY-TABLE	Case Time Tracking Summary Table
CA-TIME-TABLE	Case Time Tracking Table
CA-URL	URL of the Case in SmartAdvocate
COURT-ADDRESS-BLOCK-NO-NAME	Court Address Block Without Name
COURT-ADDRESS-HORIZ	Court Address Horizontal
COURT-ADDRESS-HORIZ	Court Address Horizontal
COURT-CLERK-ADDR1	Clerk Address1
COURT-CLERK-ADDR2	Clerk Address2
COURT-CLERK-ADDR3	Clerk Address3
COURT-CLERK-ADDRESS-BLOCK	Clerk Address Block

COURT-CLERK-ADDRESS-HORIZ	Clerk Address Horizontal
COURT-CLERK-CITY	Clerk City
COURT-CLERK-CITY-STATE-ZIP	Clerk City State Zip
COURT-CLERK-CNTY	Clerk County
COURT-CLERK-FAX	Clerk Fax
COURT-CLERK-FIRST-NAME	Clerk Name
COURT-CLERK-LAST-NAME	Clerk Last Name
COURT-CLERK-NAME	Clerk Name
COURT-CLERK-PHONE#	Clerk Phone
COURT-CLERK-PREFIX	Clerk Prefix
COURT-CLERK-STATE	Clerk State
COURT-CLERK-ZIP	Clerk Zip
COURT-JUDGE-PHONE#	Judge Phone
DEF-ATTY-FIRM-ADDRESS-BLOCK-NO-NAME	Defendant Law Firm Address Block without name
DEF-ATTY-FOR-LIST-FILE#	Defendant Law Firm with File Number Vertical List (combines
DEF-ATTY-HE-SHE	Defendant Attorney He Or She
DEF-ATTY-HIM-HER	Defendant Attorney Him Or Her
DEF-ATTY-HIS-HER	Defendant Attorney His Or Hers
DEF-ATTY-PR-ATTY-NICK-NAME	Defendant Primary Attorney Nick Name
DEPO-COMMENTS	Deposition Comments
DEPO-COURT-REPORTER	Deposition Court Reporter
DEPO-COURT-REPORTER-AGENCY	Deposition Court Reporter Agency
DEPO-DATE-ENTERED	Deposition Entered Date
DEPO-DATE-SCHEDULED	Deposition Scheduled Date
DEPO-DATE-SERVED	Deposition Date Served
DEPO-DATE-SERVEDBY	Deposition Served By
DEPO-DATE-TO-COMPLY	Deposition Date To Comply
DEPO-DEPONENT	Deposition Deponent
DEPO-EXHIBITS	Deposition Exhibits
DEPO-TYPE	Deposition Type
EXAM-AGENCY-PHONE#	Adverse Exam Scheduling Agency Phone Number
EXAM-DOCTOR-PHONE#	Adverse Exam Doctor Phone Number
EXP-PAYEE-ADDRESS-BLOCK	Case Disbursement Payee Address Block
EXP-PAYEE-ADDRESS-BLOCK-NO-NAME	Case Disbursement Payee Address Block without name
EXP-PAYEE-ADDRESS-HORIZ	Case Disbursement Payee Address Horizontal
EXP-PAYEE-CNTY	Case Disbursement Payee County
EXP-PAYEE-COUNTRY	Case Disbursement Payee Country
EXP-PAYEE-ZIP	Case Disbursement Payee Zip
F-AMT-REQUEST	Funding Requested Amount
F-REQUEST-DATE	Funding Request Date
LIEN-CERTIFIED-MAIL	Lien Certified Mail

LIEN-CHECK#	Lien Check Number
LIEN-CURR-PAYOFF-AMOUNT	Lien Current Payoff Amount
LIEN-CURR-PAYOFF-AMOUNT-DATE	Lien Date of Current Payoff Amount
LIEN-PAID-DATE	Lien Paid Date
LIEN-RECEIPT-SIGNED-DATE	Lien Receipt Signed Date
MED-PRVD-ADDRESS-BLOCK-NO-NAME	All Medical Provider Address Block without name
MED-PRVD-EMAIL	All Medical Provider Email
MED-PRVD-NPR-ADDR1	Non-Prior Medical Provider Address Line 1
MED-PRVD-NPR-ADDR2	Non-Prior Medical Provider Address Line 2
MED-PRVD-NPR-ADDR3	Non-Prior Medical Provider Address Line 3
MED-PRVD-NPR-ADDRESS-BLOCK	Non-Prior Medical Provider Address Block
MED-PRVD-NPR-ADDRESS-BLOCK-NO-NAME	Non-Prior Medical Provider Address Block without name
MED-PRVD-NPR-ADDRESS-HORIZ	Non-Prior Medical Provider Address Horizontal
MED-PRVD-NPR-BILL-DATE-AMOUNT-LIST	Non-Prior Medical Provider List of Bill Dates with Amounts
MED-PRVD-NPR-BILL-DATE-LIST	Non-Prior Medical Provider List of Bill Dates
MED-PRVD-NPR-CITY	Non-Prior Medical Provider City
MED-PRVD-NPR-CITY-STATE-ZIP	Non-Prior Medical Provider City, State And Zip Code
MED-PRVD-NPR-COMMENTS	Non-Prior Medical Provider Comment
MED-PRVD-NPR-END-DATE	Non-Prior Medical Provider End Date
MED-PRVD-NPR-END-DATE-EXP	Non-Prior Medical Provider End Date Expanded
MED-PRVD-NPR-FILE-NUM	Non-Prior Medical Provider File Number
MED-PRVD-NPR-IS-EXPERT-X	Non-Prior. Merges as X if is Expert, underscore otherwise
MED-PRVD-NPR-IS-REFERRED-X	Non-Prior. Merges as X if is Referred, underscore otherwise
MED-PRVD-NPR-LNAME	Non-Prior Medical Provider Last Name
MED-PRVD-NPR-NAME	Non-Prior Medical Provider Full Name
MED-PRVD-NPR-PHONE	Non-Prior Medical Provider Phone
MED-PRVD-NPR-PREFIX	Non-Prior Medical Provider Prefix
MED-PRVD-NPR-START-DATE	Non-Prior Medical Provider Start Date
MED-PRVD-NPR-START-DATE-EXP	Non-Prior Medical Provider Start Date Expanded
MED-PRVD-NPR-STATE	Non-Prior Medical Provider State
MED-PRVD-NPR-TOT-BILL	Non-Prior Medical Provider Total Bill Amount
MED-PRVD-NPR-TREATMENT-ENDED-X	Non-Prior. Merges as X if Treatment Ended, underscore
MED-PRVD-NPR-VISIT-DATE-LIST	Non-Prior Medical Provider List of Visits
MED-PRVD-NPR-WILL-TESTIFY-X	Non-Prior. Merges as X if will Testify, underscore otherwise
MED-PRVD-NPR-WRK-FAX	Non-Prior Medical Provider Work Fax
MED-PRVD-NPR-ZIP	Non-Prior Medical Provider Zip
MED-PRVD-PR-ADDR1	Prior Medical Provider Address Line 1
MED-PRVD-PR-ADDR2	Prior Medical Provider Address Line 2
MED-PRVD-PR-ADDR3	Prior Medical Provider Address Line 3
MED-PRVD-PR-ADDRESS-BLOCK	Prior Medical Provider Address Block
MED-PRVD-PR-ADDRESS-BLOCK-NO-NAME	Prior Medical Provider Address Block without name

MED-PRVD-PR-ADDRESS-HORIZ	Prior Medical Provider Address Horizontal
MED-PRVD-PR-BILL-DATE-AMOUNT-LIST	Prior Medical Provider List of Bill Dates with Amounts
MED-PRVD-PR-BILL-DATE-LIST	Prior Medical Provider List of Bill Dates
MED-PRVD-PR-CITY	Prior Medical Provider City
MED-PRVD-PR-CITY-STATE-ZIP	Prior Medical Provider City, State And Zip Code
MED-PRVD-PR-COMMENTS	Prior Medical Provider Comment
MED-PRVD-PR-END-DATE	Prior Medical Provider End Date
MED-PRVD-PR-END-DATE-EXP	Prior Medical Provider End Date Expanded
MED-PRVD-PR-FILE-NUM	Prior Medical Provider File Number
MED-PRVD-PR-IS-EXPERT-X	Prior. Merges as X if is Expert, underscore otherwise
MED-PRVD-PR-IS-REFERRED-X	Prior. Merges as X if is Referred, underscore otherwise
MED-PRVD-PR-LNAME	Prior Medical Provider Last Name
MED-PRVD-PR-NAME	Prior Medical Provider Full Name
MED-PRVD-PR-PHONE	Prior Medical Provider Phone
MED-PRVD-PR-PREFIX	Prior Medical Provider Prefix
MED-PRVD-PR-START-DATE	Prior Medical Provider Start Date
MED-PRVD-PR-START-DATE-EXP	Prior Medical Provider Start Date Expanded
MED-PRVD-PR-STATE	Prior Medical Provider State
MED-PRVD-PR-TOT-BILL	Prior Medical Provider Total Bill Amount
MED-PRVD-PR-TREATMENT-ENDED-X	Prior. Merges as X if Treatment Ended, underscore otherwise
MED-PRVD-PR-VISIT-DATE-LIST	Prior Medical Provider List of Visits
MED-PRVD-PR-WILL-TESTIFY-X	Prior. Merges as X if will Testify, underscore otherwise
MED-PRVD-PR-WRK-FAX	Prior Medical Provider Work Fax
MED-PRVD-PR-ZIP	Prior Medical Provider Zip
NEG-OFFR-ATTY-FEE-AMT	Negotiation Offer Attorney Fee Amount
NOTE-BODY	Note
NOTE-CREATED-MODIFIED	Create and Modify Note Details
OTHER-PROVD-CONTACT-NAME	Other Provider Contact Person Name
OTHER-PROVD-CONTACT-PHONE#	Other Provider Contact Person Phone Number
OTHER-PROVD-PHONE#	Other Providers Phone Number
PL-AOE-DOB	Plaintiff Administrator of Estate Date Of Birth
PL-AOE-SSN	Plaintiff Administrator of Estate Social Security Number
PL-EXP-TABLE-JOINED	Plaintiff Disbursement Table Totaled by Type
PL-EXP-TABLE-JOINED-REC	Plaintiff Disbursement Table Only Recoverable Totaled by
PL-FULL-NAME	Plaintiff Full Name
PL-GUARDIAN-DOB	Plaintiff Guardian Date Of Birth
PL-GUARDIAN-SSN	Plaintiff Guardian Social Security Number
PL-MED-PRVD-BILL-FINAL-AMNT	Medical Provider Bill Final Amount
PL-MED-PRVD-BILL-NEG-AMNT	Medical Provider Bill Negotiated Amount
PL-NAME-REVERSED	Plaintiff Name Reversed
PL-POA-DOB	Plaintiff Power Of Attorney Date Of Birth

PL-POA-SSN	Plaintiff Power Of Attorney Social Security Number
PL-SIGN	Plaintiff Signature
PL-SPOUSE-DOB	Plaintiff Spouse Date Of Birth
PL-SPOUSE-SSN	Plaintiff Spouse Social Security Number
PL-TIME-SUMMARY-TABLE	Plaintiff Time Tracking Summary Table
PL-TIME-TABLE	Plaintiff Time Tracking Table
POL-OFF-BADGE#	Police Officer Badge Number
POL-OFF-FIRST-NAME	Police Officer First Name
POL-OFF-LAST-NAME	Police Officer Last Name
POL-OFF-PREFIX	Police Officer Prefix
POL-RPT-OBTAINED-FROM-ADDR1	Police Report Obtained From Address1
POL-RPT-OBTAINED-FROM-ADDR2	Police Report Obtained From Address2
POL-RPT-OBTAINED-FROM-ADDR3	Police Report Obtained From Address3
POL-RPT-OBTAINED-FROM-ADDRESS-BLOCK	Police Report Obtained From Address Block
POL-RPT-OBTAINED-FROM-CITY	Police Report Obtained From City
POL-RPT-OBTAINED-FROM-CNTY	Police Report Obtained From County
POL-RPT-OBTAINED-FROM-NAME	Police Report Obtained From Name
POL-RPT-OBTAINED-FROM-STATE	Police Report Obtained From State
POL-RPT-OBTAINED-FROM-ZIP	Police Report Obtained From Zip
SET-DISB	Settlement Disbursements
SET-DISB-INTEREST	Settlement Interest On Disbursements
SET-FIRM-FEE-PLUS-DISB	Settlement Firm Fee and Disbursements
SET-MED-BILLS	Settlement Medical Bills
SET-TOTAL-DEDUCTIONS	Settlement Total Deductions
SET-WITH-CLAIM#	Claim Number of the Company Settled with
SET-WITH-INSURED	Company Settled with Insured
SOL-DATE-ADD-ONE-YEAR	Statute Of Limitations Date Plus One Year
USER-PHONE-EXT	Current User Phone Extension
WC-ATTY-ADDRESS-BLOCK	Workers Compensation Attorney Address Block
WC-LAWFIRM-ADDRESS-BLOCK	Workers Compensation Law Firm Address Block

New/Updated Reports

- Advertisement Campaigns – New Report Added. This report brings up the same data as the Advertisement Campaigns Dashboard but in a report format.

Campaign From Date NULL Campaign To Date NULL View Report

Campaign Days From Campaign Days To

Advertisement Campaign Select Columns

1 of 1 100% Find | Next

Advertisement Campaign Report

Date: 7/11/2018

Campaign	Start Date	End Date	Amount Spent	Total Fees	# of Calls	Cost Per Call	# of Wanted	Cost Per Wanted	# of Retainers	Cost Per Retainer	# Cases With Fee	Avg. Fee	# Cases With No Fee
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- Attorney Performance Report – New Report Added.

SmartAdvocate Cases: Open Closed All Case # / Plaintiff Welcome Igor

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

Attorney Performance Report Subscribe

Staff Role View Report

From Date To Date

Days Back From Days Back To

Include Staff With Zero Activity

1 of 1 Find | Next

Attorney Performance Report

5/1/2018 - 7/5/2018

Staff	Total Cases	Settled Without Check	Minimum Value Not Set	Case Status Changes	Adjourned/Cancelled Appointments	Client Contact Overdue	Attorney File Review OverDue	Supervisor File Review OverDue
Blidy, Nataliya	67	9	62	28	2	12	46	67
Cicali, Joseph	33	1	30	9	1	17	16	33
Selizhuk, Igor	54	5	50	14	0	8	48	54
Simpson, Claude, Esq.	89	9	83	29	6	27	2	89
Vogelsberg, Karl	12	2	9	10	0	3	7	12
Total	255	26	234	90	9	67	119	255

- Birthday Report – Added more columns.
- Calendar Report – Added “Date/Time and Activity type” sorting option.
- Calendar Report Advanced – Added “Date/Time and Activity type” sorting option.
- Case Expenses With Interest Report – New report for interest on case expenses calculation was added.
- Case Status Change– Added “Days Back From” and “Days Back To” parameters to facilitate subscribing to the report.
- Cases In Status – Added Status Date and Days in Status columns. Added Staff filter.
- Cases With Disbursement Exceeding Limit Report – Added In-House/Referred Out, Case Status filters and Total For The Disbursement Amount.
- Closed Cases With No Fee Report – Added Office And Case Group Filters.
- Critical Deadline Report – Case Type filter now allows selection of multiple case types.
- Daily Single Event Cases Opened – Added columns for case name and date of incident
- Disbursement Report – Added Check # filter.
- Document Search Report – New report added to enable subscription functionality to searches similar to Tools -> Document Search.
- Intake Analysis Report – Added more columns.

- Last Modified Note Report –Added Staff Filter and subscription parameters DaysFrom and DaysTo.
- Lien Report – Added Office and Is Mass Tort filters.
- Medical Records Requests Report – Added column selection.
- Monthly Intake Statistics– Added case name column.
- Negotiations Follow-up Report – New report added to have the Negotiations Follow-up Dashboard functionality in the reports.
- Problem Cases Report – New report added. The report duplicates functionality of the Problem Cases Dashboard and enables the ability to have it sent to your email on the schedule you select as a subscribed report.
- Settlement Forecast Report – Added split of the report results by months.
- Settlement Report – Added
 - Case Number
 - Case Name
 - Case Type
 - Date Opened
 - Date of Settlement
 - Expected Date
 - Gross Settlement
 - Firm Fee
 - Other
 - Prior
 - Staff
 - Status # of Days
 - Referral (which would include Paid Advertising, Other Referral & Referring Attorney)
- SOL Report – Added “Specify SOL Add/Change Dates” and “Specify SOL Add/Change Days” options to allow searches based on SOL modifications. Added new columns:
 - All Plaintiffs
 - Case Open Date
 - Retained Date
 - SOL Modified Date
 - SOL Modified By
 - SOL Creation Date
 - SOL Created By
- UDF Report – Added more UDF types to the report and made Screen selection multi-select. Added anew columns:
 - Facts
 - Plaintiff Last Name
 - Plaintiff Middle Name
 - Plaintiff Last Name
 - Plaintiff Address 1
 - Plaintiff Address 2
 - Plaintiff City
 - Plaintiff State
 - Plaintiff Zip
 - Plaintiff Home Phone Number
 - Plaintiff Cell Phone Number
 - Plaintiff Email Address
 - Plaintiff Date of Birth
 - Case Type
 - Case Sub Type

Other Changes

- Ability to specify default appointment times for different appointment types was added. It can be configured on the Picklist Maintenance page.

The screenshot shows the 'Picklist Maintenance' page in SmartAdvocate. The table lists activities with their respective start and end times. The 'Sign Up Case' activity has a start time of 11:00:00 and an end time of 13:00:00. The '50-H Physical Exam' activity has a start time of 10:00:00 and an end time of 16:00:00. The 'Start Time' and 'End Time' columns are highlighted with a green box.

Activities	Activity Categories	Active	Start Time	End Time	Action
Sign Up Case	Case-Related Appointment	Yes	11:00:00	13:00:00	[Edit] [Delete]
50-H Physical Exam	Case-Related Appointment	Yes	10:00:00	16:00:00	[Edit] [Delete]

- Ability to schedule an appointment in the time zone different from the server default was added. Available time zones can be specified in the Picklist Maintenance -> Time Zones.

The screenshot shows the 'New Appointment' form in SmartAdvocate. The 'Time Zone' dropdown menu is open, showing options for 'Eastern Standard Time', 'Central Standard Time', and 'Eastern Standard Time'. The dropdown is highlighted with a red box.

Activity Type*: Conference Call
 Personal Status: Open
 Subject: * Conference Call -
 Start time: * 08/17/2018 Fri 10:00 AM
 End time: * 08/17/2018 Fri 04:00 PM
 Recurrence: One Time Event

- Ability to define Case Group specific Statuses was added. If you select "Limit Statuses" only selected statuses will be available for cases in this Group.

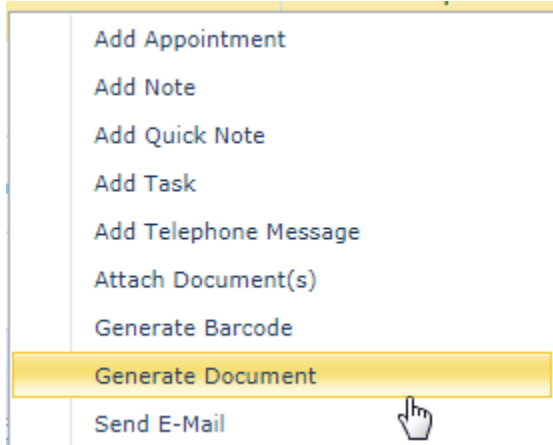
The screenshot shows the 'Picklist Maintenance' page in SmartAdvocate. The 'Limit Statuses' and 'Statuses' columns are highlighted with green boxes. The 'Airplane Accident' row is selected, and the 'Edit Form' dialog is open, showing the 'Limit Statuses' dropdown menu with selected statuses.

Descriptions	Incident Types	Limit Statuses	Statuses	Action
Admin Cases	Client	Yes	Active, Suspended	[Edit] [Delete]
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 PDU Ordered, Pre-Lit .1 - Retainer rec'd -, Pre-Lit 03 - PI Gathering Medi, Pre-Lit 03 - MT PDU Needed, Pre-Lit 01 - MT To Be Opened, A - Top Case, B - Good Case	[Edit] [Delete]

Limit Statuses: A - Top Case, B - Good Case, Pre-Lit .1

Statuses: [x] Pre-Lit .1 - Retainer rec'd - WAITING Photos, [x] Pre-Lit .3 Under Consideration - Retainer/Police Rpt REC'D, [x] Pre-Lit 01 - MT To Be Opened, [x] Pre-Lit 01- PI New Case - Initial Letters to be Sent, [x] Pre-Lit 02 - MT Additional Information Needed, [x] Pre-Lit 02 - PI Investigation/Client Contact

- Case Context Menu (Top Search Results page, Case Browse Results page, My Cases and My Favorite Cases on the My SmartAdvocate page) – added Generate Document option to go directly to Document Generation page.



- Case Monitor Widget – new component that allows you to monitor automatically created cases that have not been personally handled by office staff yet i.e. cases that came in thru chat, web, and answering service. Widget is designed to stay in the corner of a computer monitor so it's always visible so these types of cases do not fall thru the cracks. It will also display manually created cases that have no comments other than the first automatic case creation comment.

SmartAdvocate Case Monitor v1.0.2.1					Number of cases: 14	Settings	X
8014416	Hernia Mesh		6/13/2018 9:49 PM	12:28	Luna, Huayna		
8014417	Negligence - Not Death	Monthly Re	6/13/2018 9:49 PM	12:28	Pantoja, Amy		
8014418	Negligence - Not Death		6/13/2018 9:53 PM	12:25	Luna, Huayna		
8014420	Invokana/Invokamet - Not Death	% Leg	6/13/2018 10:11 PM	12:07	Morejon, Laura		
8014421	Negligence - Not Death		6/13/2018 10:12 PM	12:06	Luna, Huayna		
8014433	Negligence - Not Death		6/14/2018 12:31 AM	09:46	Luna, Huayna		
8014441	Negligence - Not Death	up to date	6/14/2018 8:15 AM	02:03	Pantoja, Amy		
8014443	Negligence - Not Death		6/14/2018 8:30 AM	01:47	Pantoja, Amy		
8014444	Negligence - Not Death		6/14/2018 9:21 AM	00:56	Pantoja, Amy		

- Closed Case Notification Email – Case Close Reason added to the email.
- Default focus after page is loaded was changed for several pages to help users save extra clicks:
 - Documents – Document description filter.
 - Notes – Note filter.
 - Tasks – Subject filter.
 - Timeline – Event filter.
- iOS Mobile App – Added State code to Case Search results display.
- iOS Mobile App – Added Time Tracking support.
- iOS Mobile App – Added pending appointments display on the case summary.
- Added 5 more UDF pages (UDFs #1 - UDFs #5). By default only the UDFs #1 page will be visible under Other group of the case menu. Other pages can be added (and renamed) using Case Menu Configurator.
- Added 5 pages that can be customized on the SQL side by updating special Stored Procedures to return custom HTML code (Custom View Page 1 - 5).

- Multiple Case Sub Types can now be selected for a case.

The screenshot shows the 'Edit Case' window with the following details:

- Case Number: 1017260
- Case Name: Gomez v. Ingram
- Type: Auto-Municipal-Not Death
- Sub Type: Bus Accident, Head On Collision, Intersection
- Incident State: (checkboxes for)
 - Bus Accident
 - Careless to Passenger
 - Cross Over
 - Head On Collision
 - Intersection
 - Intersection w/ Inoperable Lights
 - Lack of Informed Consent
 - Left Roadway
- Case Open Date: (empty)
- Wanted/Accepted: (empty)
- Estimated Value: (empty)
- Range: 3,000
- Comments: This

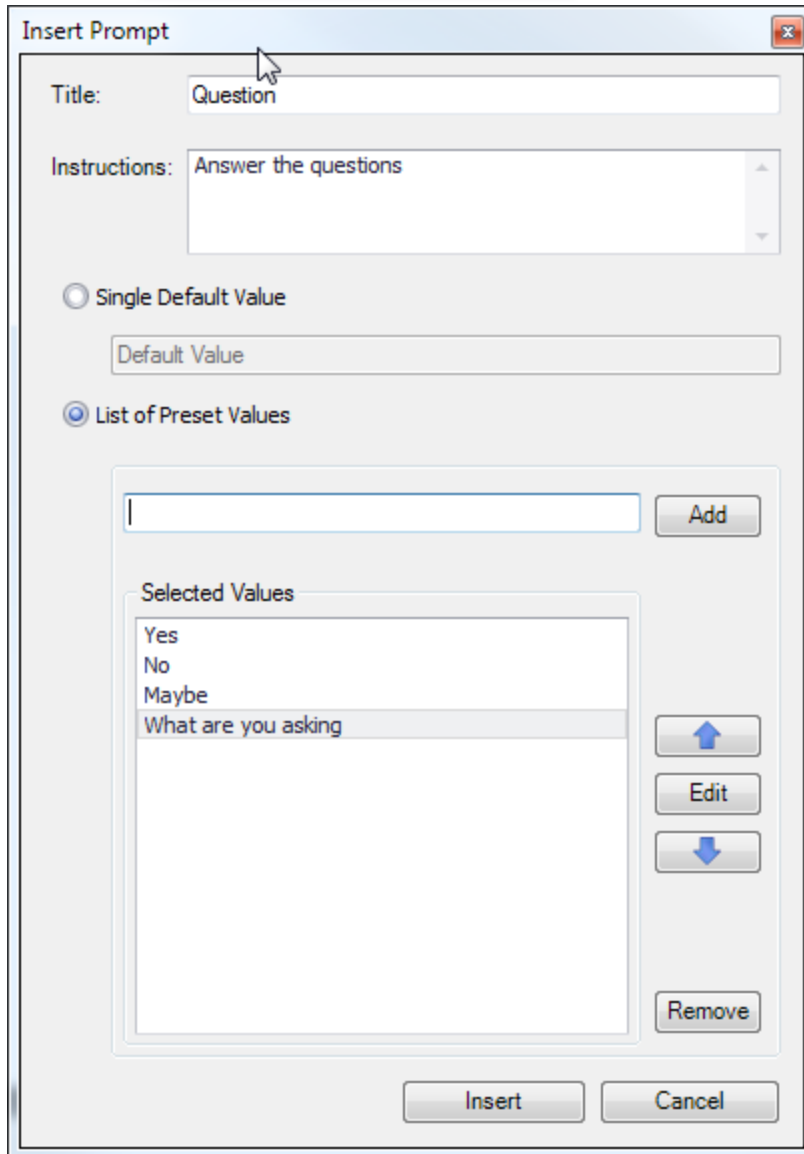
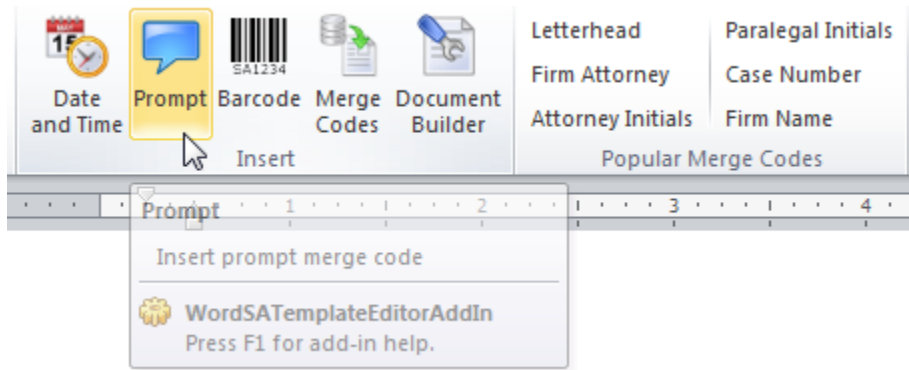
Buttons at the bottom: Save, Cancel, Close.

Footer: Modified at 7/6/2018 11:48:29 AM by Selizhuk, Igor.

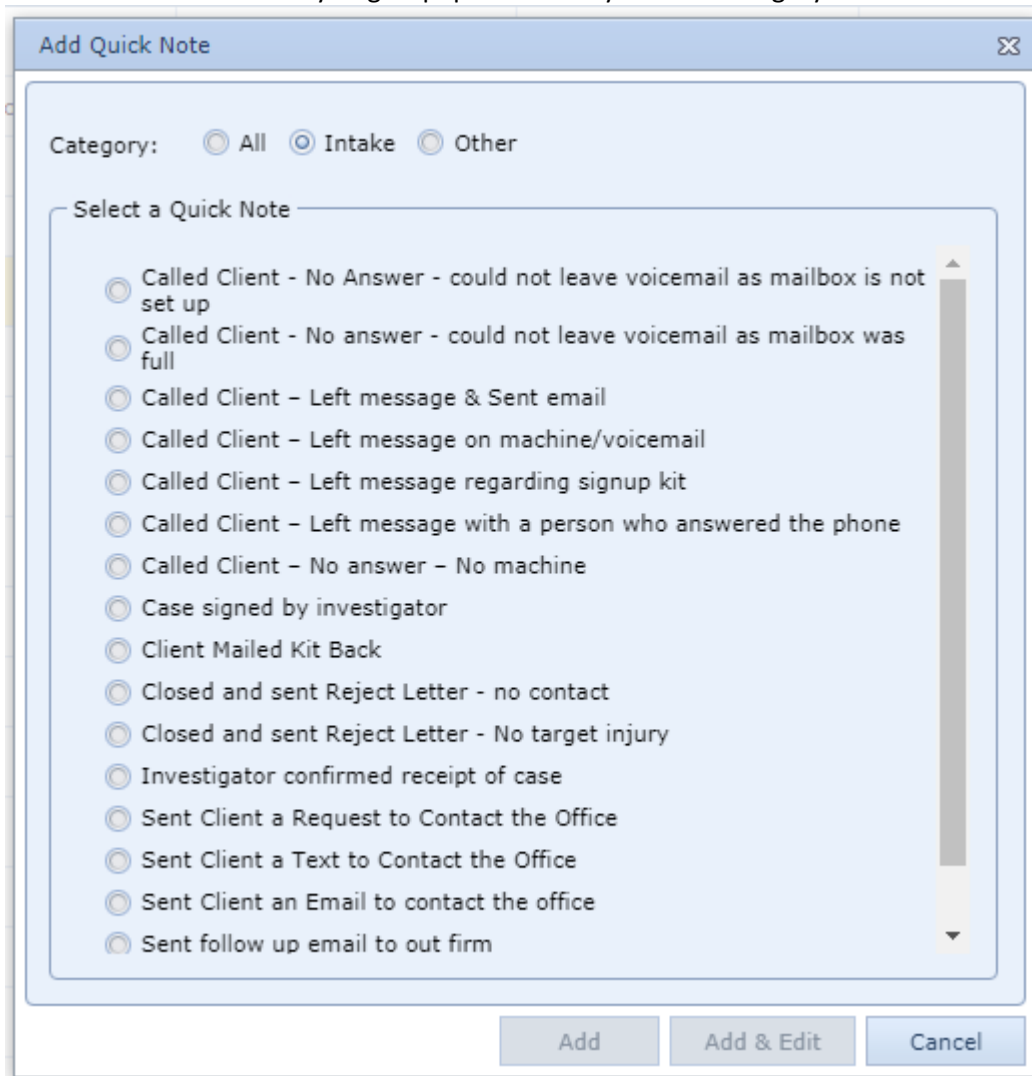
- Top Search – Automatically fill in the second date for the Date of Birth and Date of Incident searches.
- Top Search – When searching by the name (Plaintiff/Defendant) the Nickname (Other Name) will be searched as well.
- Document Merge Add-in – Added functionality to remember selection of the separator for multi-select merge codes.
- Texting integration – Added system parameter to specify email address to be notified if the incoming text message comes from the phone number that is not associated with any case in SmartAdvocate.

Administrator Parameters Setup			
Group Description	Parameter Description	Selected Value	Actions
	about text messages		
Notifications	Email address to be notified about text messages that were not matched to the case.	support@smartadvocate.com	

- Insert Prompt dialog was added to the Template Editor. Template prompts now support preset multiple choice values.



- Quick Notes – Added ability to group quick notes by custom Category.



- Tab names – Added support for Tab name templates. Now you can control how browser tabs are named for SmartAdvocate pages. Available placeholders <Case #>, <Case Name>, <Page Name>, <Plaintiff Name>, <Defendant Name>, <Client Name>.

Group Description	Parameter Description	Selected Value	Actions
page	template		
Page name template parameters group	Case related page name template	<Client Name> - <Case #> - <Page Name> - <Case Name>	
Page name template parameters group	Non case related page name template	<Page Name> - SmartAdvocate	

