

SmartAdvocate Release Notes (v2017.03.10)

These release notes cover updates and new features added to the SmartAdvocate software between August 2016 and March 2017.

Important Notes

This release of SmartAdvocate, like so many of our past releases, introduces hundreds of changes that will make your practice more productive and efficient. Here are some of the highlights:

- Note templates were introduced (you can use the same merge codes as in email templates).
- Support for Note templates was added to workplans.
- Support for column selection for table merge codes was added in the Template Editor.
- Over 200 new merge codes have been added.
- Embedded documentation (help) has been significantly updated and improved.



- Case Menu customization capabilities have been added – you can now customize order and visibility of the Case Menu items for different case groups.
- The QuickBooks integration has been significantly improved and new settings have been added.
- Optional support for full text search in the documents was added.
 - Microsoft SQL Server 2012 or later is required.
 - Documents will have to be moved from their current location and stored on same server as Microsoft SQL Server.
 - SmartAdvocate will not charge separate license fee for this feature, but will charge installation and configuration fee (\$2,000).
 - Additional third party software for indexing of specific file types may be required (IFilter).
 - Free IFilter software is available for Microsoft Word and Word Perfect documents.
 - Free IFilter for PDF files is available from Adobe, but it only supports SQL Server 2012.
 - If you have Microsoft SQL Server 2014 or 2016 and need PDF file indexing you will need to purchase “Foxit PDF IFilter - Server – Production” from Foxit software. A 25% discount is available for SmartAdvocate customers. Use promo code **IFilter25off**
<https://www.foxitsoftware.com/shopping/checkout.php?action=view>









Integrations New and Previously Available

- **CallFire** – Texting Service. Send and receive text messages directly in SmartAdvocate.
<http://www.callfire.com>
- **Deitz Court Reporting** – Court reporting services. Receive deposition transcripts directly in SmartAdvocate.
<http://deitzcourtreporting.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 cases created from ICE leads automatically.
<http://intakeconversion.com>
- **inSync** – Litigation Support Service. 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.insynclitigation.com/>
- **Legal Intake Professionals** – Legal Answering Service & More. Get new cases created from LIP leads automatically.
<http://www.legalintake.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 Investigations** – Handle trial prep, process service, investigations, surveillance and statements. Get documents and bills directly to you and automatically uploaded to SA.
<http://onlinepmi.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.
- **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 \$500 installation and configuration fee as well as 3rd party fees associated with them.

Updated Pages

- Admin – Picklist Maintenance – Office – Added parameter to specify SMS phone number per office
- Admin – Picklist Maintenance – Office – Added ability to select contact associated with the office.
- Admin – System Parameters – Added configuration to display Critical Alert when defendant from the case exists as plaintiff in another case.
- Admin – System Parameters – Postage prices now can be configured.

Administrator Parameters Setup			
			Export   
Drag a column header here to group by that column			
Group Description	Parameter Description	Selected Value	Actions
post			
Postage Cost	Cost of 1 oz package.	0.465	
Postage Cost	Cost of 2 oz package.	0.675	
Postage Cost	Cost of 3 oz package.	0.90	
Postage Cost	Cost of 4 oz package.	1.61	
Postage Cost	Default for "Other" package cost.	2.00	

- Admin – System Parameters – Added 2 parameters to select type of lienor to be used when bills are copied to liens screen.

Administrator Parameters Setup			
			Export   
Drag a column header here to group by that column			
Group Description	Parameter Description	Selected Value	Actions
lien			
Medical Provider Lienor Types	Type of lienor to be used when copy bills to liens is used for individual providers	Doctor	
Medical Provider Lienor Types	Type of lienor to be used when copy bills to liens is used for organizations	Hospital	

- Admin – System Parameters – Added parameter that controls adding empty defendants for all possible defendant roles if no default defendant selected.
- Admin – System Parameters – Added parameter that controls restart the case numbering when year/month case prefix changes (defaults to true – restart).

- Admin – System Parameters – Added parameters to control password complexity/expiration.

Group Description	Parameter Description	Selected Value	Actions
password			
Password Enforcement	Password complexity numbers on/ off	True	
Password Enforcement	Password complexity policy on/off	False	
Password Enforcement	Password complexity special characters on/off	True	
Password Enforcement	Password complexity uppercase and lowercase letters on/off	True	
Password Enforcement	Password expiration days value	30	
Password Enforcement	Password expiration policy on/off	True	
Password Enforcement	Password minimum length policy on/ off	True	
Password Enforcement	Password minimum length value	7	

- Admin – System Parameters (Internal) – Added parameters that controls user’s ability to edit case name and case number.
- Admin – Users – Added ability to specify billing rate for each user.
- Barcode Generation page – “Generate in a new window” button was added to facilitate generations of multiple different barcodes for the same case.
- Case Browse Results – Mass Case Status Update – Added ability to specify custom comments for the new status.

Change Status

Status Type:

Current Status: Select Status
 All Statuses

New Status:

Comments:

- Case Browse – Added checkbox to show inactive case types.
- Case Browse Results – Mass Staff Reassignment – Added an option to reassign medical records requests in addition to tasks and appointments.
- Contact Card – added comments field to emails grid.
- Contact Card (organizations) – Code Field added.

Contact

Name *:

Other Name:

Office Hours:

EIN #:

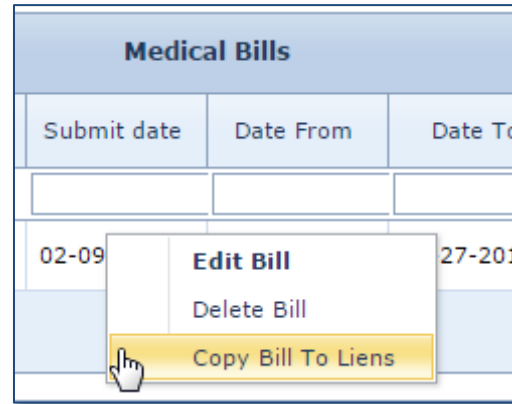
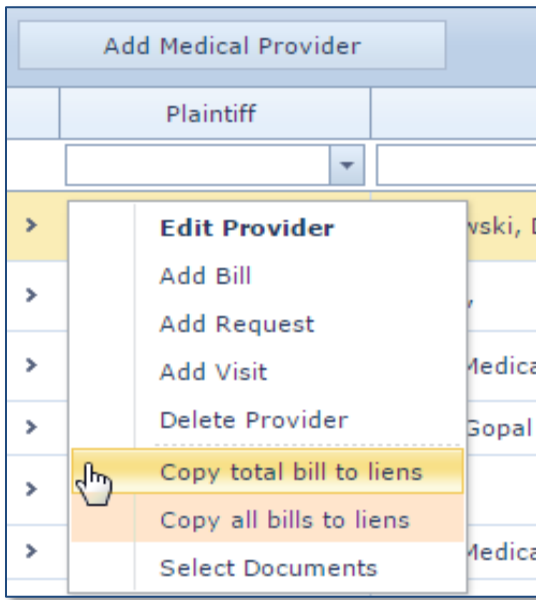
Code:

- Dashboards – Intake Follow-up Dashboard, My Cases Dashboard – Added Office and Defendant Insurance Carrier Code columns.
- Dashboards – Referred Out Firm Follow-up – New columns have been added to the dashboard: Case Value From, Case Value To, Expected Resolution Date, Docket #.
- Dashboards – Statute of Limitations – This page was completely redesigned using new controls.
- Defendant – Summary – Added ability to specify defendant group. This can help you organize defendants in situations when there are, for example, multiple drivers and owners. It can also be used to sort defendants (just assign different group number to each defendant).
- General – Case Summary – Text messages are now shown in the list of Last Notes.
- General – Case Summary – Staff comments and Refer Out comments are now shown on the Case Summary page.
- General – Critical Deadlines – Added full history for critical deadline changes.

Critical Deadline History			
Change Date	User Name	Event Name	Change Details
1/31/2017	Selizhuk, Igor V., Esq.	Update	Waived: [] --> [v]
1/31/2017	Selizhuk, Igor V., Esq.	Update	Complied Date: 01/27/2017 --> 01/28/2017 Comments from: To: Test comment
1/27/2017	Baez, Dayhanara, Esq.	Insert	Type: Subpeona Deadline Due Date: 01/27/2017 Complied Date: 01/27/2017 Waived: [] Superceded: [] Respondent: Gomez, Melissa H. Request From: Gomez, Melissa H. Action type: Requested by

- General – Critical Deadlines – Added “BP/Interrogatories Exchanged” and “Response to BP/Interrogatories Responses Received” fields to SOL table.
- General – Disbursements – Added ability to associate document(s) with a disbursement record.
- General – Tasks – New pages to see all the tasks associated with the case.
- General – Timeline – Added SOL events to the timeline (Created, Modified, Deleted).
- General – Retainer/Referral – Added new field File # for prior attorney.
- My SmartAdvocate – My Appointments – Added filtering option to “Include appointments from my cases”. When enabled, appointments for other people from user’s cases will be shown even if the user is not one of the attendees.
- Litigation – Depositions – Added ability to associate document(s) with a deposition record.
- Litigation – Discovery – Added ability to associate document(s) with a discovery record.
- Litigation – Discovery – Added “Date To Comply” column.
- Litigation – Motions – Added ability to associate document(s) with a motions record.
- Litigation – Motions – When new motion record is being created “Draft Date” will default to today’s date.
- Litigation – Trial Prep – Added ability to associate document(s) with a trial prep record.
- Other – ARB/Mediations – Added a “Docs” columns showing a number of documents in the case associated with the Arbitration organization.
- Plaintiff – Employment – Added field to indicate Union.
- Plaintiff – Medical Providers – Added ability to associate document(s) with a medical provider record.
- Plaintiff – Medical Providers – Added Medical Provider Total Payments and Balance columns.

- Plaintiff – Medical Providers – Added ability to create a lien based on bill(s) information.



- Plaintiff – Medical Providers - Prior – New page to manage prior medical providers. Functionally this page is the same as Medical Providers page, but designed to store information related to prior medical providers.
- Tools – Mass Document Upload – Added ability to automatically append original file name to the description of the uploaded documents.

The screenshot shows a document upload form. It includes fields for 'Case:', 'Date:', 'Direction:' (with radio buttons for Incoming, Outgoing, Memo), 'Document Category:', and 'Document Sub-Category:'. On the right side, there are fields for 'From:' and 'To:' (both with 'Our Firm' selected), and 'Priority:' (with radio buttons for Critical, High, Normal, Low). A 'Description:' field is also present. At the bottom, there are buttons for 'Assign Documents to Case' and 'Clear Form'. A checkbox labeled 'Append Original File Name to Description' is highlighted with a red box.

- Tools – Documents Search – Added Case Status and Incident Date columns. Added Direction filter.

New Merge Codes Added

ARB-CONT-PERSON-ADDR1	Arbitration/Mediation Contact Person Address Line 1
ARB-CONT-PERSON-ADDR2	Arbitration/Mediation Contact Person Address Line 2
ARB-CONT-PERSON-ADDR3	Arbitration/Mediation Contact Person Address Line 3
ARB-CONT-PERSON-CITY	Arbitration/Mediation Contact Person City
ARB-CONT-PERSON-CITY-STATE-ZIP	Arbitration/Mediation Contact Person City, State and Zip
ARB-CONT-PERSON-CNTY	Arbitration/Mediation Contact Person County
ARB-CONT-PERSON-STATE	Arbitration/Mediation Contact Person State
ARB-CONT-PERSON-ZIP	Arbitration/Mediation Contact Person Zip
ARB-ORG-ADDR1	Arbitration/Mediation Organization Address Line 1
ARB-ORG-ADDR2	Arbitration/Mediation Organization Address Line 2
ARB-ORG-ADDR3	Arbitration/Mediation Organization Address Line 3
ARB-ORG-CITY	Arbitration/Mediation Organization City
ARB-ORG-CITY-STATE-ZIP	Arbitration/Mediation Organization City, State and Zip Code
ARB-ORG-CNTY	Arbitration/Mediation Organization County
ARB-ORG-STATE	Arbitration/Mediation Organization State
ARB-ORG-ZIP	Arbitration/Mediation Organization Zip
CA-ATTY-BAR#	Case Attorney Bar Number
CA-ATTY-PREFIX	Case Attorney Prefix
CA-ATTY-SUFFIX	Case Attorney Suffix
CA-CM-ADDR1	Case Manager Address1
CA-CM-ADDR2	Case Manager Address2
CA-CM-ADDR3	Case Manager Address3
CA-CM-ADDRESS-BLOCK	Case Manager Address Block
CA-CM-ADDR-HORIZ	Case Manager Address Horizontal
CA-CM-CITY	Case Manager City
CA-CM-CITY-STATE-ZIP	Case Manager City State Zip
CA-CM-CNTY	Case Manager County
CA-CM-EMAIL	Case Manager Email
CA-CM-FIRST-NAME	Case Manager First Name
CA-CM-INIT	Case Manager Initials
CA-CM-LAST-NAME	Case Manager Last Name
CA-CM-NAME	Case Manager Full Name
CA-CM-OCCUP	Case Manager Occupation
CA-CM-PREFIX	Case Manager Prefix
CA-CM-STATE	Case Manager State
CA-CM-SUFFIX	Case Manager Suffix
CA-CM-ZIP	Case Manager Zip
CA-MED-PRVD-TOTAL-BILL-BALANCE	Case Medical Providers Total Bill Balance

CA-PARA-PREFIX	Case Paralegal Prefix
CA-PARA-SUFFIX	Case Paralegal Suffix
CA-PRIMARY-CONT-ADDR1	Case Primary Contact Address1
CA-PRIMARY-CONT-ADDR2	Case Primary Contact Address2
CA-PRIMARY-CONT-ADDR3	Case Primary Contact Address3
CA-PRIMARY-CONT-ADDRESS-BLOCK	Case Primary Contact Address Block
CA-PRIMARY-CONT-ADDRESS-BLOCK-NO-NAME	Case Primary Contact Address Block without name
CA-PRIMARY-CONT-ADDRESS-HORIZ	Case Primary Contact Address Block Horizontal
CA-PRIMARY-CONT-CITY	Case Primary Contact City
CA-PRIMARY-CONT-CITY-STATE-ZIP	Case Primary Contact City, State Zip
CA-PRIMARY-CONT-CNTY	Case Primary Contact County
CA-PRIMARY-CONT-EMAIL	Case Primary Contact Email
CA-PRIMARY-CONT-FAX	Case Primary Contact Fax
CA-PRIMARY-CONT-FIRST-NAME	Case Primary Contact First Name
CA-PRIMARY-CONT-LAST-NAME	Case Primary Contact Last Name
CA-PRIMARY-CONT-PHONE#	Case Primary Contact Phone Number
CA-PRIMARY-CONT-PREFIX	Case Primary Contact Prefix
CA-PRIMARY-CONT-STATE	Case Primary Contact State
CA-PRIMARY-CONT-SUFFIX	Case Primary Contact Suffix
CA-PRIMARY-CONT-ZIP	Case Primary Contact Zip
CA-PRIMARY-PL-ADDR1	Primary Plaintiff Address1
CA-PRIMARY-PL-ADDR2	Primary Plaintiff Address2
CA-PRIMARY-PL-ADDR3	Primary Plaintiff Address3
CA-PRIMARY-PL-ADDRESS-BLOCK	Primary Plaintiff Address Block
CA-PRIMARY-PL-ADDRESS-BLOCK-NO-NAME	Primary Plaintiff Address Block without name
CA-PRIMARY-PL-ADDRESS-HORIZ	Primary Plaintiff Address Block Horizontal
CA-PRIMARY-PL-CITY	Primary Plaintiff City
CA-PRIMARY-PL-CITY-STATE-ZIP	Primary Plaintiff City, State Zip
CA-PRIMARY-PL-CNTY	Primary Plaintiff County
CA-PRIMARY-PL-EMAIL	Primary Plaintiff Email
CA-PRIMARY-PL-FAX	Primary Plaintiff Fax
CA-PRIMARY-PL-FIRST-NAME	Primary plaintiff first name
CA-PRIMARY-PL-FULL-NAME	Primary plaintiff Full name
CA-PRIMARY-PL-LAST-NAME	Primary plaintiff last name
CA-PRIMARY-PL-PHONE#	Primary Plaintiff Phone Number
CA-PRIMARY-PL-PREFIX	Primary Plaintiff Prefix
CA-PRIMARY-PL-STATE	Primary Plaintiff State
CA-PRIMARY-PL-SUFFIX	Primary Plaintiff Suffix
CA-PRIMARY-PL-ZIP	Primary Plaintiff Zip
CA-SP-DMG-TABLE	Case Special Damages Table
CA-STAFF-OCCUP	Case Staff Occupation

CA-WIT-PHONE	Witness Phone
DEF-ADDRESS-BLOCK-HORIZ	Defendant Address Block Horizontal
DEF-ADDRESS-BLOCK-NO-NAME	Defendant Address Block Without Name
DEF-ATTY-FIRM-ADDR1	Defendant Law Firm Address Line 1
DEF-ATTY-FIRM-ADDR2	Defendant Law Firm Address Line 2
DEF-ATTY-FIRM-ADDR3	Defendant Law Firm Address Line 3
DEF-ATTY-FIRM-CITY	Defendant Law Firm Address City
DEF-ATTY-FIRM-CITY-STATE-ZIP	Defendant Law Firm Address City, State Zip
DEF-ATTY-FIRM-STATE	Defendant Law Firm Address State
DEF-ATTY-FIRM-ZIP	Defendant Law Firm Address Zip
DEF-ATTY-PR-ATTY-ADDR1	Defendant Primary Attorney Address Line 1
DEF-ATTY-PR-ATTY-ADDR2	Defendant Primary Attorney Address Line 2
DEF-ATTY-PR-ATTY-ADDR3	Defendant Primary Attorney Address Line 3
DEF-ATTY-PR-ATTY-ADDRESS-BLOCK	Defendant Primary Attorney Address block
DEF-ATTY-PR-ATTY-ADDRESS-HORIZ	Defendant Primary Attorney Address Horizontal
DEF-ATTY-PR-ATTY-BAR#	Defendant Primary Attorney Bar Number
DEF-ATTY-PR-ATTY-CITY	Defendant Primary Attorney City
DEF-ATTY-PR-ATTY-CITY-STATE-ZIP	Defendant Primary Attorney City, State and Zip
DEF-ATTY-PR-ATTY-EMAIL	Defendant Primary Attorney Email
DEF-ATTY-PR-ATTY-FIRST-NAME	Defendant Primary Attorney First Name
DEF-ATTY-PR-ATTY-INIT	Defendant Primary Attorney Initials
DEF-ATTY-PR-ATTY-LAST-NAME	Defendant Primary Attorney Last Name
DEF-ATTY-PR-ATTY-MIDDLE-NAME	Defendant Primary Attorney Middle Name
DEF-ATTY-PR-ATTY-NAME	Defendant Primary Attorney Full Name
DEF-ATTY-PR-ATTY-PHONE#	Defendant Primary Attorney Phone Number
DEF-ATTY-PR-ATTY-PREFIX	Defendant Primary Attorney Prefix
DEF-ATTY-PR-ATTY-STATE	Defendant Primary Attorney State
DEF-ATTY-PR-ATTY-SUFFIX	Defendant Primary Attorney Suffix
DEF-ATTY-PR-ATTY-ZIP	Defendant Primary Attorney Zip
DEF-AUTO-OWNER-ADDR1	Defendant Vehicle Owner Address1
DEF-AUTO-OWNER-ADDR2	Defendant Vehicle Owner Address2
DEF-AUTO-OWNER-ADDR3	Defendant Vehicle Owner Address3
DEF-AUTO-OWNER-ADDRESS-BLOCK	Defendant Vehicle Owner Address Block
DEF-AUTO-OWNER-ADDR-HORIZ	Defendant Vehicle Owner Address Horizontal
DEF-AUTO-OWNER-CITY	Defendant Vehicle Owner City
DEF-AUTO-OWNER-CITY-STATE-ZIP	Defendant Vehicle Owner City, State Zip
DEF-AUTO-OWNER-CNTY	Defendant Vehicle Owner County
DEF-AUTO-OWNER-STATE	Defendant Vehicle Owner State
DEF-AUTO-OWNER-ZIP	Defendant Vehicle Owner Zip
DEF-INS-COV-TYPE	Defendant Insurance Coverage Type
DEF-INS-OTHER-NAME	Defendant Insurance Other Name

DEF-NICK-NAME	Defendant Nick Name
DEF-OTHER-NAME	Defendant Other Name
EMP-EMPLYR-CITY	Employer City
EMP-EMPLYR-FAX	Employer Fax
EMP-EMPLYR-PHONE	Employer Phone
EMP-EMPLYR-STATE	Employer State
EMP-EMPLYR-ZIP	Employer Zip
EXP-AMOUNT	Case Disbursement Amount
EXP-CHK#	Case Disbursement Check Number
EXP-DSCRPTN	Case Disbursement Description
EXP-FAX	Expert Fax
EXP-PAYEE	Case Disbursement Payee
EXP-PAYEE-ADDR1	Case Disbursement Payee Address Line 1
EXP-PAYEE-ADDR2	Case Disbursement Payee Address Line 2
EXP-PAYEE-ADDR3	Case Disbursement Payee Address Line 3
EXP-PAYEE-CITY	Case Disbursement Payee Address City
EXP-PAYEE-STATE	Case Disbursement Payee Address State
EXP-PREFIX	Expert Prefix
EXP-SUFFIX	Expert Suffix
FIRM-ATTORNEY-BAR#	Firm Attorney Bar Number
FUNERAL-EXP-AMT-ADJUST	Funeral Expense Adjusted
FUNERAL-EXP-AMT-PAID	Funeral Expenses Amount Paid
FUNERAL-EXP-BILL-AMT	Funeral Bill Amount
FUNERAL-EXP-BILL-NUM	Funeral Bill Invoice Number
FUNERAL-EXP-BILL-PAID(Y/N)	Was Funeral Bill Paid
FUNERAL-EXP-BILL-RECD-DATE	Funeral Bill Received Date
FUNERAL-EXP-CHECKNUM	Check Number Of Payment For Funeral Expense
FUNERAL-EXP-COMMENTS	Funeral Expenses Comments
FUNERAL-EXP-LIENOR	Name Of Person With Lien For Funeral Expenses
FUNERAL-EXP-PAYEE	Name Of Funeral Home Being Paid
FUNERAL-EXP-PAYOR	Name Of Person Paying Funeral Home
FUNERAL-EXP-TYPE	Type Of Funeral Home Expense
INV-INVEST-FAX	Investigator Fax
INV-PROV-FAX	Investigator Provider Fax
MED-PRVD-END-DATE	Medical Provider End Date
MED-PRVD-IS-EXPERT-X	Merges as X if is Expert, underscore otherwise
MED-PRVD-IS-REFERRED-X	Merges as X if is Referred, underscore otherwise
MED-PRVD-START-DATE	Medical Provider Start Date
MED-PRVD-TREATMENT-ENDED-X	Merges as X if Treatment Ended, underscore otherwise
MED-PRVD-VISIT-COMMENTS	Medical Provider Visit Comments
MED-PRVD-VISIT-COMPLAINT	Medical Provider Visit Complaint

MED-PRVD-VISIT-DIAGNOSIS	Medical Provider Visit Diagnosis
MED-PRVD-VISIT-END-DATE	Medical Provider Visit End Date
MED-PRVD-VISIT-START-DATE	Medical Provider Visit Start Date
MED-PRVD-VISIT-TREATMENT-PLAN	Medical Provider Visit Treatment Plan
MED-PRVD-VISIT-TYPE	Medical Provider Visit Type
MED-PRVD-WILL-TESTIFY-X	Merges as X if will Testify, underscore otherwise
PL-ALL-MED-PRVD-TOTAL-BILL-BALANCE	Plaintiff Medical Providers Total Bill Balance
PL-ATTY-BAR#	Plaintiff Attorney Bar Number
PL-AUTO-OWNER-ADDR3	Plaintiff Automobile Owner Address3
PL-AUTO-OWNER-CITY	Plaintiff Automobile Owner City
PL-AUTO-OWNER-CNTY	Plaintiff Automobile Owner County
PL-AUTO-OWNER-STATE	Plaintiff Automobile Owner State
PL-AUTO-OWNER-ZIP	Plaintiff Automobile Owner Zip
PL-DOC-BILL-COMMENTS	Doctor Bill Comments
PL-DOC-BILL-DATE-FROM	Doctor Bill Date From
PL-DOC-BILL-DATE-TO	Doctor Bill Date To
PL-EXP-TOTAL	Plaintiff Disbursement Total only disbursement type
PL-EXP-TOTAL-ALL	Plaintiff Disbursement Total all disbursements
PL-EXP-TOTAL-ALL-EXP	Plaintiff Disbursement Total all disbursements expanded
PL-EXP-TOTAL-EXP	Plaintiff Disbursement Total only disbursement type
PL-EXP-TOTAL-NR	Plaintiff Disbursement Total only disbursement type non
PL-EXP-TOTAL-NR-EXP	Plaintiff Disbursement Total only disbursement type non
PL-EXP-TOTAL-WV	Plaintiff Disbursement Total only disbursement type waived
PL-EXP-TOTAL-WV-EXP	Plaintiff Disbursement Total only disbursement type waived
PL-HOS-BILL-COMMENTS	Hospital Bill Comments
PL-HOS-BILL-DATE-FROM	Hospital Bill Date From
PL-HOS-BILL-DATE-TO	Hospital Bill Date To
PL-INS-OTHER-NAME	Plaintiff Insurance Other Name
PL-LIEN-CONFIRMED-AMT-TOTAL	Plaintiff Total Confirmed Lien Amount
PL-LIEN-NEGOTIATED-AMT-TOTAL	Plaintiff Total Negotiated Lien Amount
PL-LIEN-UNCONFIRMED-AMT-TOTAL	Plaintiff Total Unconfirmed Lien Amount
PL-MED-PRVD-BILL-COMMENTS	Medical Provider Bill Comments
PL-MED-PRVD-BILL-DATE-FROM	Medical Provider Bill Date From
PL-MED-PRVD-BILL-DATE-TO	Medical Provider Bill Date To
PL-MED-PRVDS-BILL-TOTAL-TABLE	Plaintiff Medical Provider Bills Total Table
PL-MED-PRVD-TOTAL-BILL-BALANCE	Medical Provider Total Bill Balance
PL-OTHER-NAME	Plaintiff Other Name
PL-POA-ADDR1	Plaintiff Power of Attorney Address1
PL-POA-ADDR2	Plaintiff Power of Attorney Address2
PL-POA-ADDR3	Plaintiff Power of Attorney Address3
PL-POA-ADDRESS-BLOCK	Plaintiff Power of Attorney Address Block



PL-POA-ADDRESS-HORIZ	Plaintiff Power of Attorney Address Block Horizontal
PL-POA-CITY	Plaintiff Power of Attorney City
PL-POA-CITY-STATE-ZIP	Plaintiff Power of Attorney City State Zip
PL-POA-CNTY	Plaintiff Power of Attorney County
PL-POA-FIRST-NAME	Plaintiff Power of Attorney First Name
PL-POA-LAST-NAME	Plaintiff Power of Attorney Last Name
PL-POA-NAME	Plaintiff Power of Attorney Full Name
PL-POA-PREFIX	Plaintiff Power of Attorney Prefix
PL-POA-STATE	Plaintiff Power of Attorney State
PL-POA-SUFFIX	Plaintiff Power of Attorney Suffix
PL-POA-ZIP	Plaintiff Power of Attorney Zip
PL-PR-LANG	Plaintiff Primary Language
PL-SP-DMG-TABLE	Plaintiff Special Damages Table
PR-ATTY-EMAIL	Prior Attorney Email
REF-ATTY-EXP	Referred Attorney Disbursement
REF-CITY	Referral City
REF-FIRST-NAME	Referral First Name
REF-LAST-NAME	Referral Last Name
REF-STATE	Referral State
REF-ZIP	Referral Zip
SUB-OUT-ATTY-CNTY	Sub Out Attorney County
SUB-OUT-LAW-ADDR1	Sub Out Law Firm Address1
SUB-OUT-LAW-ADDR2	Sub Out Law Firm Address2
SUB-OUT-LAW-ADDR3	Sub Out Law Firm Address3
SUB-OUT-LAW-ADDRESS-BLOCK	Sub Out Law Firm Address Block
SUB-OUT-LAW-ADDRESS-BLOCK-NO-NAME	Sub Out Law Firm Address Block without name
SUB-OUT-LAW-CITY	Sub Out Law Firm City
SUB-OUT-LAW-CITY-STATE-ZIP	Sub Out Law Firm City, State And Zip Code
SUB-OUT-LAW-CNTY	Sub Out Law Firm County
SUB-OUT-LAW-STATE	Sub Out Law Firm State
SUB-OUT-LAW-ZIP	Sub Out Law Firm Zip

- New dynamic merge code was added – CA-STATUS. This merge code allows to inset the current status of the case for various status type (standard and custom).



New/Updated Reports

- Multiple reports have been modified to exclude headers in the Excel export to simplify sorting/searching in Excel.
- Case Time Tracking – column selection filter was added.

Case Time Tracking



Date From 
 Date To 



Days Back From
 Days Back To


Staff 
Select Columns 




- Cases In Status Report – Added new parameters – Days Back From and Days Back To.
- Cases With Disbursement Exceeding Report – Added Primary Attorney, Paralegal and Case Manager columns. Added Staff. Filter for Open/Closed cases was added.

Cases With Disbursement Exceeding Report

Case Group 
 Case Type 

Staff 
 Show Cases 

Open/Closed Status 


« ◀ of 2 ? ▶ » Find | Next   


Cases With Disbursement Exceeding Limit Report Total Cases: 1301


Case#	Case Name	Primary Attorney	Paralegal	Case Manager	Case Status	Maximum Disbursement Amount	Disbursement Amount
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- Lien Report - More filters added: Open/Closed, Lienor Type, Days back from, Days back to, Include Liens Without a Date?


Lien Report

From Date 
 To Date

Open/Closed 
 Staff

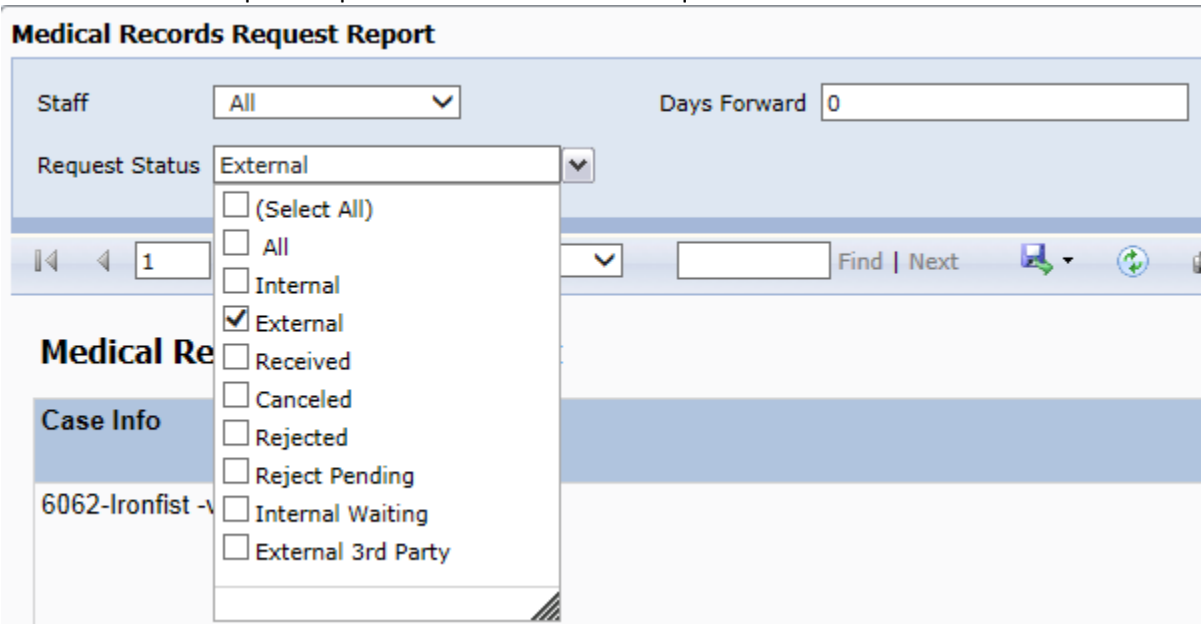
Lienor Type 
 Lien Name Contains

Days Back From
Days Back To

Include Liens Without A Date? 

- New Case Report – More columns have been added: Case Name, Plaintiff Name and Defendant Name.

- Medical Records Request Report – added new filter – Request Status.



- Monthly Intake Statistics Report – Added new filter “Refer Out/In House”.
- Over Due Tasks Report – added new filters -> Subject Contains and Task Category
- QuickBooks Disbursements – new report to see updates that were done from QuickBooks.
- Settlement Forecast Report – new report. This report allows you to forecast future settlements/fees. It is based on the Minimal Settlement Value and Expected Resolution date of the case. Expected fees are calculated based on retainer and referral information (Fee structure).

Settlement Forecast Report [Subscribe](#)

Expected Resolution From Date: 2/15/2017 Expected Resolution To Date: 3/31/2020

Days From: 0 Days To: 0

Staff: All

1 of 1 100% Find | Next

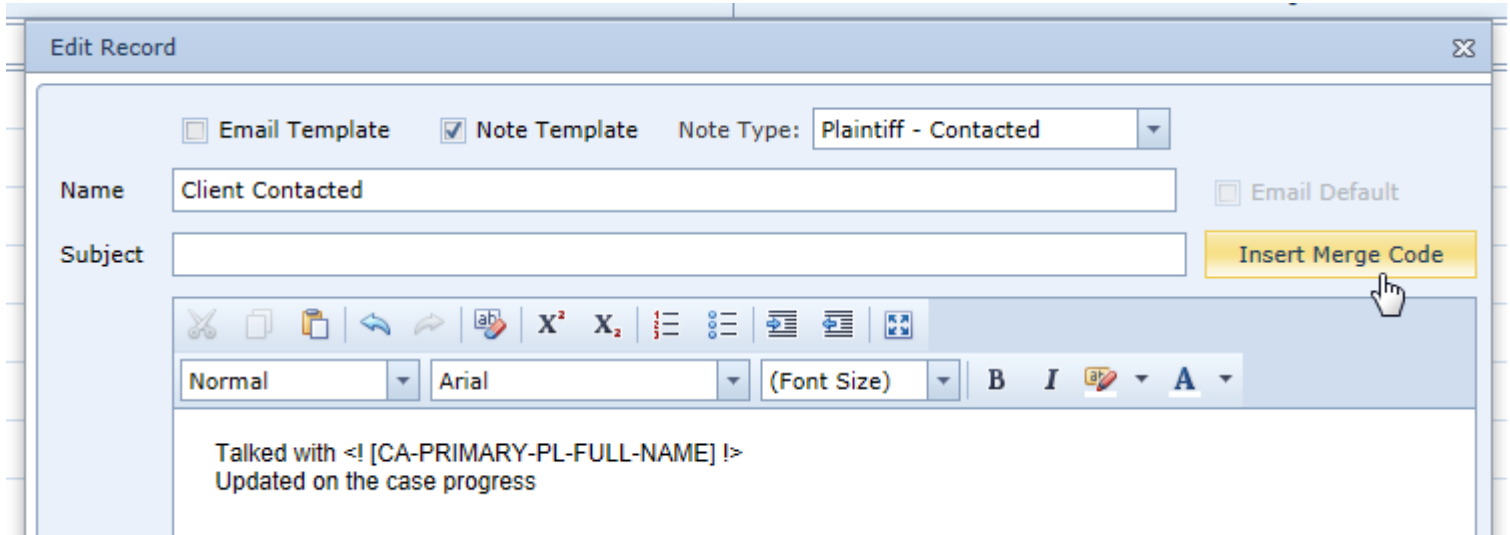
Settlement Forecast Date: 2/15/2017 2:56 PM

Case #	Case Name	Case Status	Open Date	Case Group	Attorney	Case Minimum Value	Expected Resolution Date	Disbursement Amount	Projected Total Fee	Projected Referral Fee	Projected Net Fee
6074	Prymec v. Allen	Pre-Lit 0 - New Case - Initial Letters to be Sent	09/19/2016	General Negligence		\$900,000.00	09/20/2017	\$11.50	\$300,000.00	\$100,000.00	\$200,000.00

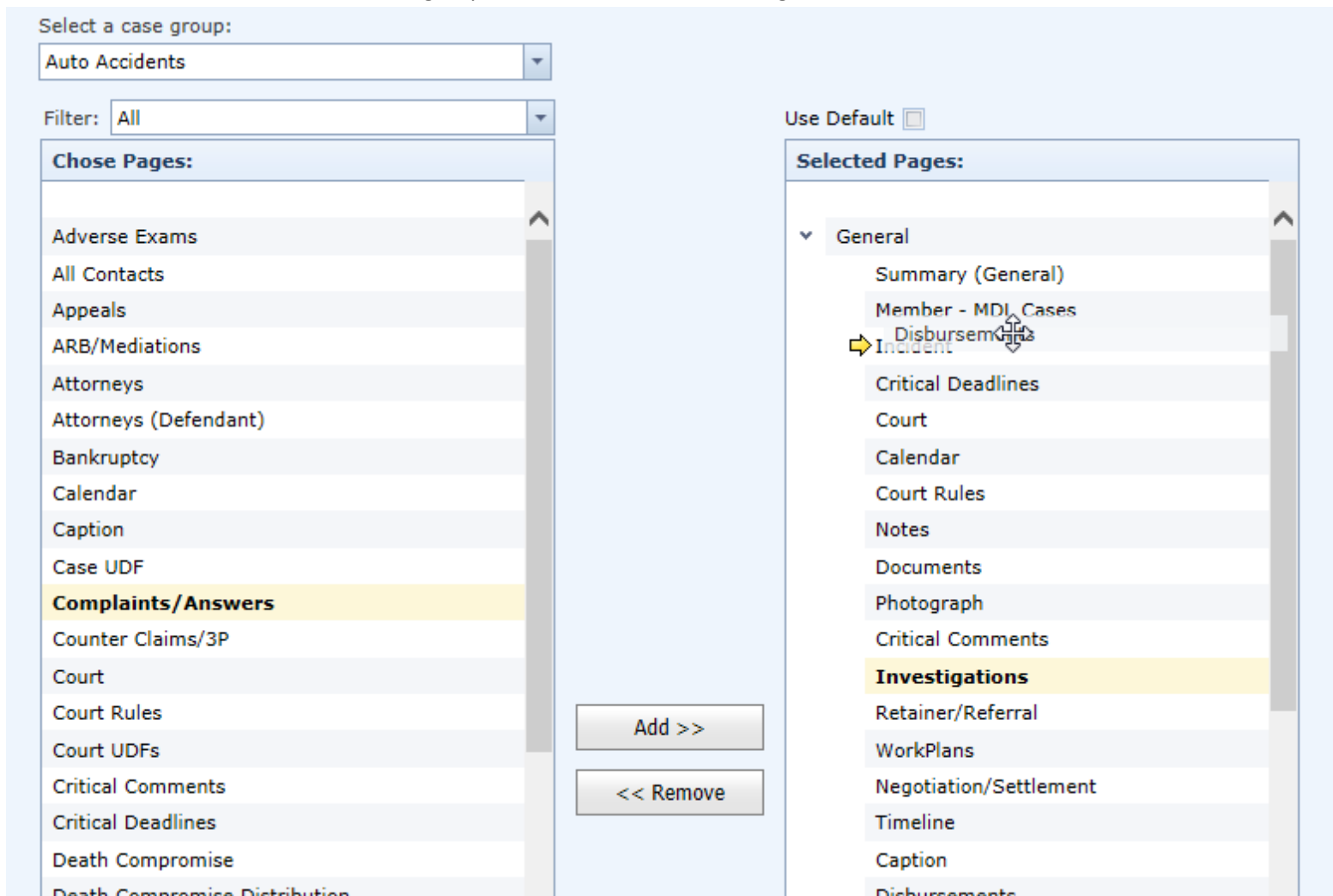
- Settlement Report – added two new filters to facilitate subscriptions - Days Back From and Days Back To.
- SOL Report – New (optional) Columns were added:
 - Date of service to SOL report.
 - Method of service to SOL report.
 - Affidavit filed to SOL report.
 - Answer due to SOL report.
 - BP/Interrogatories due to SOL report.
 - BP/Interrogatories Served/Received to SOL report.
 - BP/Interrogatories exchanged to SOL report.
 - BP/Interrogatories responses received to SOL report.
- Staff Activity Report – Added “Staff” filter. Added “Tasks Completed” column.

Other Changes

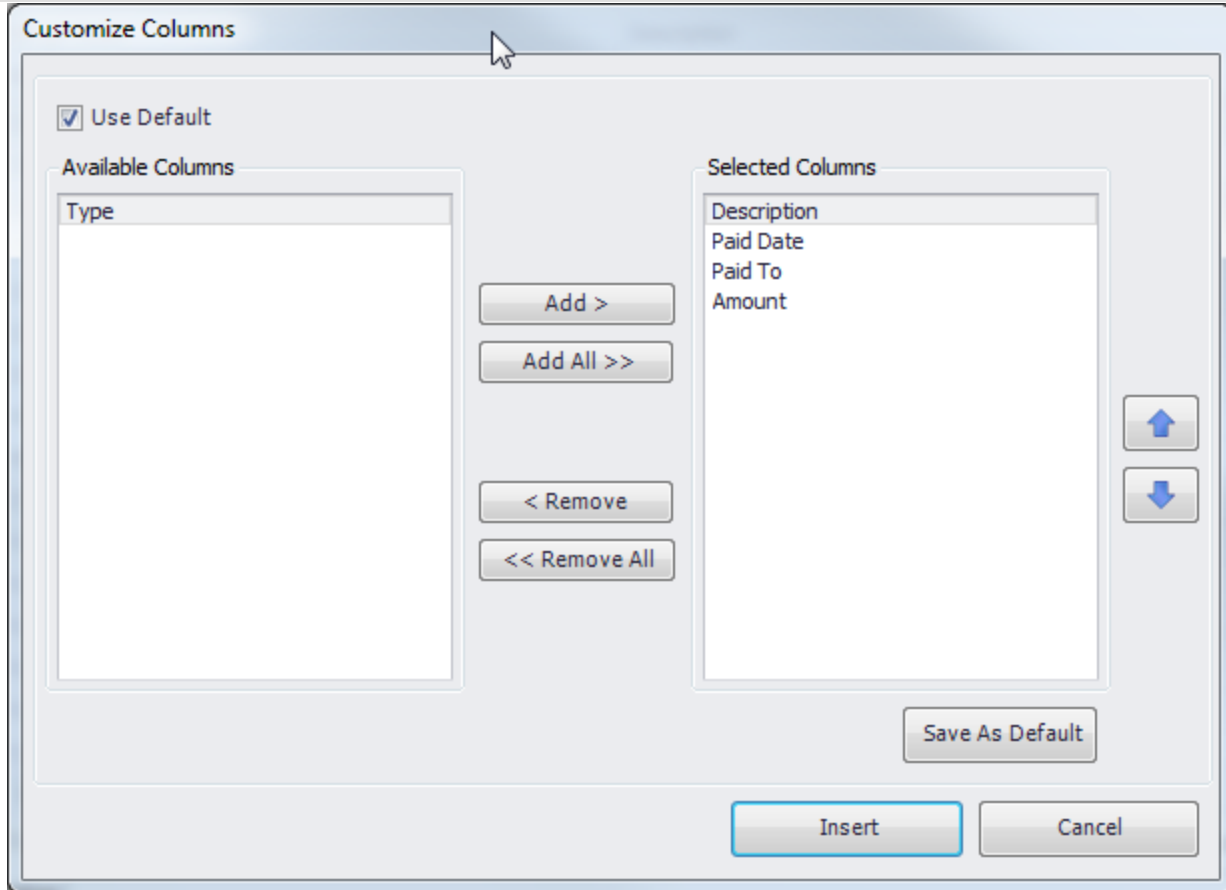
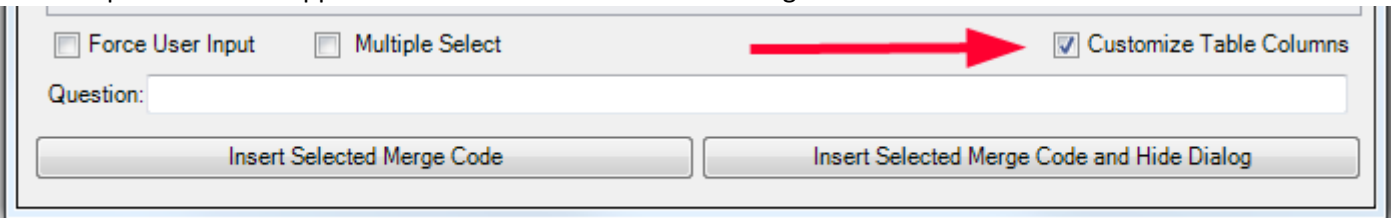
- Support for Note templates has been added.



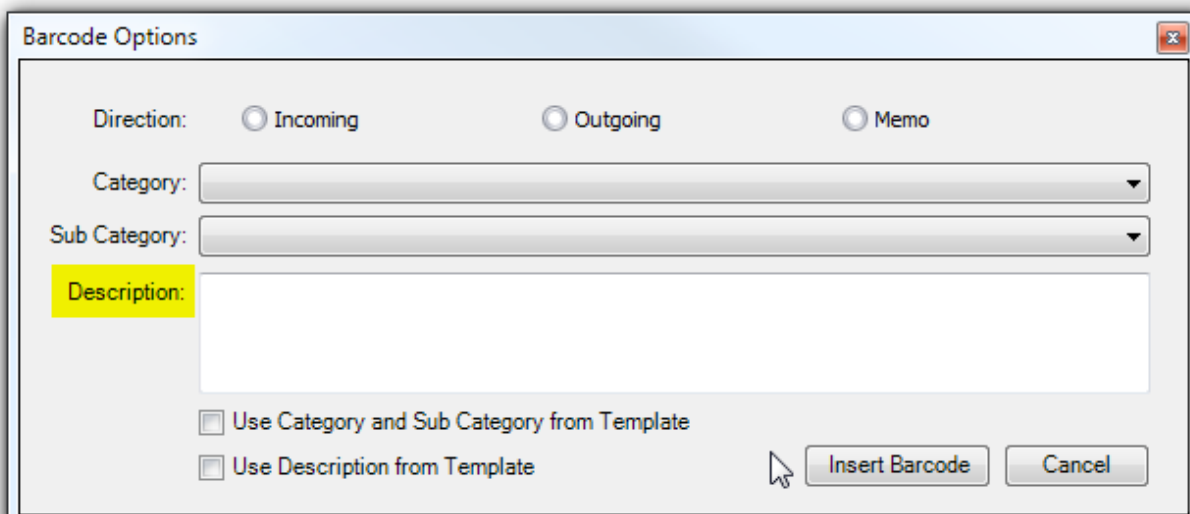
- Case Menu customization capabilities have been added – you can now configure order and visibility of the Case Menu items for different case groups. Admin -> Case Menu Configurator.



- Template Editor – Support for column selection for table merge codes was added.



- Support for barcodes in the document templates was introduced in the last release. In this release the option to specify document description was added.



- Critical Alert was added for cases where Defendant exists as Plaintiff in another case. This alert is configurable under Admin – System Parameters.
- Case Wizard and Incident Screen will display a warning if the incident date is entered in the future.

- Task Dialog has been redesigned to clearly separate template selection and task information. Field to indicate time spent on the task was added.




- Top Search – Defendant Insurance Code search option added.
- Brief contact info panel now has send text button (if SMS integration is configured).



















- Ability to control permissions Staff Panel and Status Panel of the Case Summary page was added. Now you will be able to allow users to edit case status, but not the staff assignments, for example.

Page title	Page url	Page group	Page access
summary	cases		
Summary	/CaseSummary.aspx	General	Read Only
Summary (Status Panel)	/CaseSummary.aspx#Status	General	Read Write
Summary (Staff Panel)	/CaseSummary.aspx#Staff	General	Read Only

- Logic for matching received medical records to requests has been improved. If there is more than one outstanding medical request for the same plaintiff from the same medical provider, the system will match the requested record's type to the received document sub-category. If those match, the corresponding request will be marked as received. Otherwise, the system will function as before and will send a notification email to case staff to resolve the ambiguity.
- eLaw integration has been improved
 - Adjourned appointments – staff for new appointment will be assigned based on configuration settings instead of copying from original appointment (the same way as it is for new appointments).
 - Appointment type can be mapped based on Appearance type from eLaw. Mapping can be set up in eLaw Appearance Types in PickList Maintenance.


Pick List

Export   

eLaw Appearance Type	SA Appointment Type	Action
<input type="text"/>	<input type="text"/>	
MOTION	Motion	 
SUPREME - INITIAL (FIRST TIME ON)	Preliminary Conference	 
SUPREME - JUDICIAL HEARING OFFICER	Hearing	 
SUPREME - MED/MAL PRE-PANEL	Appointment	 
SUPREME - POOL JUDGE	Appointment	 
SUPREME - PRELIMINARY CONFERENCE	Preliminary Conference	 
SUPREME - PRE-TRIAL	Pre-Trial Conference	 
SUPREME - REFEREE	Appointment	 
SUPREME - TRIAL	Trial	 

- Motion # will be shown on appointment form.
- If multiple cases have the same index number – first case will be picked.
- Elaw icon was added to the Case Summary page for the cases that are synchronized with eLaw.

Courts / Dockets

Supreme Court Queens County	55/12 (10/09/2012) 	Judge: James
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- QuickBooks integration has been significantly improved and new settings were added.
 - PlaintiffNamePattern - Plaintiff Name Pattern %FN,%MN,%MI,%MIP,%LN,%PR
 - CaseNumberAtTheEnd - Case Number at the end of customer name
 - VoidByCheckNumber - Void Checks By Check Number
 - SynchronizeClosedCases - Synchronize Closed Cases
 - QBAccountPayableName - QB Account Payable Name for bills
 - QBBankAccountNames - Names of QB Bank Accounts for checks and payments. Separated by , .