

SmartAdvocate Release Notes (v2016.02.26)

These release notes cover updates and new features added to SmartAdvocate software between November 2015 and February 2016.

Important Notes

Just like many releases before this release of SmartAdvocate introduces hundreds of changes that will make your practice more productive and efficient. Here are some of the highlights:

- In this release we added over 100 new merge codes.
- Documents now can be previewed on the Documents page.
- Email templates can be edited directly in the SmartAdvocate interface.
- This release introduces complete redesign of the Special Damages page.
- Case Browse now allows you to search cases based on the values entered in the User Definable Fields (UDFs) as well as based on custom statuses.
- In addition to Word document templates, now SmartAdvocate allows you to turn fillable PDFs into templates that can be automatically populated with information from the system.
- This release also introduces ability to send mass emails directly from SmartAdvocate.

Integrations New and Previously Available

- **CallFire** – Texting Service. Send and receive text messages directly in SmartAdvocate.
<http://www.callfire.com>
- **ELaw** – eDocket, eCalendaring, Calendar ewatching and ecopying Service. Get court appointments directly to you SA (and Outlook) calendar.
<http://www.e-law.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.

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 – Email Templates – New page to simplify customization of the email templates.
- Admin – Document Templates – Added export to all grids.
- Admin – UDF Editor – Page was completely redesigned. Added ability to modify Incident Type UDFs (associated with the case groups).
- Case Browse – Ability to search by plaintiff's birthday was added (under Misc. tab).

- Case Browse – Ability to specify relative dates for open, retained, closed and settled days was added. This will be helpful if you need to save a Case Browse filter that shows all cases opened in the last 3 days, for example.

- Case Browse – Ability to search cases based on different types of sub-statuses was added.

- Case Browse – Ability to search cases based on the values entered in the User Definable Fields (UDFs) was added.
- Case Documents – preview panel was added. The document preview can be displayed on the bottom or right side of the screen. The preview panel supports Microsoft Word (.docx), PDF, Outlook Email (.msg), and most of the image formats (.jpg, .gif, .bmp, .png).
- Case Notes – New columns were added - unformatted note (text only) and brief note (truncated unformatted note). Preview panel was added. Now you can configure columns not to show the full note (show brief note) and view the notes in the preview panel.
- Case Photographs – Added ability to print photographs directly from SmartAdvocate (including multiple photographs as the same time).
- Case Summary – indicators for Primary Plaintiff and Primary Contact were added.

| Plaintiffs | | |
|------------|-----------|--------------------|
| Plaintiff | Primary | Role |
| [Redacted] | Contact | (P)-Owner/Operator |
| [Redacted] | Plaintiff | (P)-Plaintiff |

- Defendant – Attorneys – New page to see all attorneys for all defendants at a glance.
- Negotiation/Settlement – Settlement View will now show injury summary (in addition to individual injuries).

- Negotiation/Settlement – Edit dialog for negotiations and settlements will now show Created/Modified by information.
- Negotiation/Settlement – new fields were added to Checks Received grid – Check Number and Check Type.

| Check Received | Amount | Check # | Type | Action |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|--------|---------|------|---------------------------------------------------|
| 02/22/2016 | 100000 | 1234 | | <input type="checkbox"/> <input type="checkbox"/> |
| <div style="border: 1px solid black; padding: 5px;"> Attorney Fee Interest Principal </div> | | | | |

- Plaintiff/Defendant – Attorneys – Ability to indicate multiple attorneys working on the case was added.

Edit Record

Defendant: Jones, Lilan

Law Firm: Law Office of Karen L. Lawrence

Type: Defense Attorney

Select attorney

| Primary | Attorney Name | # |
|----------------------------------|--------------------------|--------|
| <input type="radio"/> | Butler, Michael J., Esq. | Delete |
| <input checked="" type="radio"/> | Cacciabauda, Scott M. | Delete |

- Plaintiff – Other Providers – Page updated with right-click menu and Show/Hide Columns option.
- Plaintiff – Plaintiff Fact Sheet – new UDF page to collect information for Plaintiff Fact Sheets.
- Plaintiff – Special Damages – Page was redesigned and updated with new controls. Ability to add custom special damages was introduced.

| Summary | | | | | | | | | | | | | | |
|--------------------------------------------------------------|--------------|--------------------|---------------------|-----------|------------|------------------------|-------------|------------|------------|------------|----------------|----------|--------|--|
| Plaintiffs | Bill Amount | Amount Paid | Balance | | | | | | | | | | | |
| Garcia, Melissa R. | \$130,456.04 | \$54.00 | \$130,402.04 | | | | | | | | | | | |
| Baker, Leah | \$7,000.00 | \$2,000.00 | \$5,000.00 | | | | | | | | | | | |
| Kennedy, Catherine S., Esq. | \$463,236.00 | \$9,999.00 | \$453,237.00 | | | | | | | | | | | |
| Small, Terry, Esq. | \$0.00 | \$0.00 | \$0.00 | | | | | | | | | | | |
| \$600,692.04 | | \$12,053.00 | \$588,639.04 | | | | | | | | | | | |
| Special Damage | | | | | | | | | | | | | | |
| Add Special Damage Export | | | | | | | | | | | | | | |
| Plaintiff | Type | Sub-Type | Bill # | Account # | Loss | Negotiated Bill Amount | Amount Paid | Balance | From Date | To Date | Submitted Date | Comments | Action | |
| Baker, Leah (S) | Other | Funeral | 1234 | 654789 | \$7,000.00 | \$6,000.00 | \$2,000.00 | \$4,000.00 | 02/01/2016 | 02/06/2016 | 02/16/2016 | | | |
| Garcia, Melissa R. | Lost Wages | Salary | | | \$1,000.00 | | \$0.00 | \$1,000.00 | | | | | | |

- Settlement/Fee Production Dashboard – Referral source type column was added to the details grid.
- Surrogate – Death Compromise – Page was redesigned and updated with new controls.
- Surrogate – Death Compromise Distribution – Page was redesigned and updated with new controls.
- Surrogate – Distributees/Others – Page was redesigned and updated with new controls.
- Surrogate – Letter of Administration – Page was redesigned and updated with new controls.
- Surrogate – Will information – Page was redesigned and updated with new controls.
- Tools – Mass Emailing – New Page that allows you to send mass emails using email templates. This page can be accessed either through the menu or using Mass Update function on the Case Browse Results page.

New Merge Codes Added

| | |
|----------------------------------|--------------------------------------------------------------------|
| CA-EXP-TABLE-JOINED | Case Disbursement Table Totaled by Type |
| CA-EXP-TABLE-JOINED-REC | Case Disbursement Table Only Recoverable Totaled by Type |
| CA-MED-PRVD-TOT-BILL-BALANCE | Case Medical Providers Total Bill Balance |
| CC-ADJ-ADDRESS-BLOCK_NO_NAME | Counter Claim Adjuster Address block without name |
| COURT-JUDGE-ADDR1 | Judge Address1 |
| COURT-JUDGE-ADDR2 | Judge Address2 |
| COURT-JUDGE-ADDR3 | Judge Address3 |
| COURT-JUDGE-ADDRESS-BLOCK | Judge Address Block |
| COURT-JUDGE-ADDRESS-HORIZ | Judge Address Horizontal |
| COURT-JUDGE-CITY | Judge City |
| COURT-JUDGE-CITY-STATE-ZIP | Judge City State Zip |
| COURT-JUDGE-CNTY | Judge County |
| COURT-JUDGE-STATE | Judge State |
| COURT-JUDGE-ZIP | Judge Zip |
| DEF-ADJ-ADDRESS-BLOCK_NO_NAME | Defendant Adjuster Address block without name |
| DEF-ADJ-HE-SHE | Defendant Adjuster He or She |
| DEF-ADJ-INS-ADDRESS-BLOCK | Defendant Adjuster's Address Block with Insurance Name and Address |
| DEF-ADJ-INS-ADDRESS-BLOCK2 | Defendant Adjuster's Address Block with Insurance Name and |
| DEF-AUTO-OPERATOR-ADDR1 | Defendant Automobile Operator Address1 |
| DEF-AUTO-OPERATOR-ADDR2 | Defendant Automobile Operator Address2 |
| DEF-AUTO-OPERATOR-ADDR3 | Defendant Automobile Operator Address3 |
| DEF-AUTO-OPERATOR-ADDRESS-BLOCK | Defendant Automobile Operator Address Block |
| DEF-AUTO-OPERATOR-ADDR-HORIZ | Defendant Automobile Operator Address Horizontal |
| DEF-AUTO-OPERATOR-CITY | Defendant Automobile Operator City |
| DEF-AUTO-OPERATOR-CITY-STATE-ZIP | Defendant Automobile Operator CityStateZip |
| DEF-AUTO-OPERATOR-CNTY | Defendant Automobile Operator County |
| DEF-AUTO-OPERATOR-STATE | Defendant Automobile Operator State |
| DEF-AUTO-OPERATOR-ZIP | Defendant Automobile Operator Zip |
| FIRM-ADDRESS-BLOCK-NO-NAME | Firm Address without the name |
| FIRM-STAFF-FIRST-NAME | Firm Staff First Name |
| FIRM-STAFF-LAST-NAME | Firm Staff Last Name |
| FIRM-STAFF-PREFIX | Firm Staff Prefix |
| FIRM-STAFF-SUFFIX | Firm Staff Suffix |
| LIEN-ADDR-HORIZ | Liens Address line |
| LIEN-CONFIRMED-AMT-CASE-TOTAL | Case Total Confirmed Lien Amount |
| LIEN-CONTACT-PERSON-FAX | Lien Contact Person Fax |
| LIEN-CONTACT-PERSON-FIRST-NAME | Lien Contact Person First Name |
| LIEN-CONTACT-PERSON-LAST-NAME | Lien Contact Person Last Name |

| | |
|---------------------------------|---------------------------------------------------------|
| LIEN-CONTACT-PERSON-PREFIX | Lien Contact Person Prefix |
| LIEN-FAX | Lienor Fax |
| LIEN-NEGOTIATED-AMT-CASE-TOTAL | Case Total Lienor Negotiated Amount |
| LIEN-RECOVERY-AGENT | Lien Recovery Agent |
| LIEN-UNCONFIRMED-AMT-CASE-TOTAL | Case Total Unconfirmed Lien Amount |
| MED-PRVD-BILL-DATE-LIST | Medical Provider List of Bill Dates |
| MED-PRVD-TOT-BILL | Medical Provider Total Bill Amount |
| MED-PRVD-TOT-BILL-BALANCE | Medical Provider Total Bill Balance |
| MED-PRVD-VISIT-DATE-LIST | Medical Provider List of Visits |
| NEG-WITH-NAME | Name of the organization negotiating with |
| OTHER-PROVD-ADDR1 | Other Providers Address1 |
| OTHER-PROVD-ADDR2 | Other Providers Address2 |
| OTHER-PROVD-ADDR3 | Other Providers Address3 |
| OTHER-PROVD-ADDRESS-BLOCK | Other Providers Address Block |
| OTHER-PROVD-ADDR-HORIZ | Other Providers Address Horizontal |
| OTHER-PROVD-CITY | Other Providers City |
| OTHER-PROVD-CITY-STATE-ZIP | Other Providers CityStateZip |
| OTHER-PROVD-CNTY | Other Providers County |
| OTHER-PROVD-NAME | Other Providers Name |
| OTHER-PROVD-STATE | Other Providers State |
| OTHER-PROVD-ZIP | Other Providers Zip |
| PL-ADJ-ADDRESS-BLOCK_NO_NAME | Plaintiff Insurance Adjuster Address block without name |
| PL-ADJ-HE-SHE | Plaintiff Adjuster He or She |
| PL-ATTY-CNTY | Plaintiff Attorney County |
| PL-ATTY-FIRST-NAME | Plaintiff Attorney First Name |
| PL-ATTY-LAST-NAME | Plaintiff Attorney Last Name |
| PL-ATTY-LF-ADDR3 | Plaintiff Attorney Law Firm Address Line 3 |
| PL-ATTY-LF-CITY | Plaintiff Attorney Law Firm City |
| PL-ATTY-LF-CNTY | Plaintiff Attorney Law Firm County |
| PL-ATTY-LF-STATE | Plaintiff Attorney Law Firm State |
| PL-ATTY-LF-ZIP | Plaintiff Attorney Law Firm Zip Code |
| PL-AUTO-OPERATOR-ADDR1 | Plaintiff Automobile Operator Address1 |
| PL-AUTO-OPERATOR-ADDR2 | Plaintiff Automobile Operator Address2 |
| PL-AUTO-OPERATOR-ADDR3 | Plaintiff Automobile Operator Address3 |
| PL-AUTO-OPERATOR-ADDRESS-BLOCK | Plaintiff Automobile Operator Address Block |
| PL-AUTO-OPERATOR-ADDR-HORIZ | Plaintiff Automobile Operator Address Horizontal |
| PL-AUTO-OPERATOR-CITY | Plaintiff Automobile Operator City |
| PL-AUTO-OPERATOR-CITY-STATE-ZIP | Plaintiff Automobile Operator CityStateZip |
| PL-AUTO-OPERATOR-CNTY | Plaintiff Automobile Operator County |
| PL-AUTO-OPERATOR-STATE | Plaintiff Automobile Operator State |
| PL-AUTO-OPERATOR-ZIP | Plaintiff Automobile Operator Zip |

| | |
|----------------------------------|-----------------------------------------------------------------|
| PL-EXP-TABLE | Plaintiff Disbursement Table includes All Disbursement Types |
| PL-EXP-TABLE-REC | Plaintiff Disbursement Table only Disbursement type recoverable |
| PL-MED-PRVDS-BILL-TABLE | Plaintiff Medical Provider Bills |
| PL-MED-PRVDS-VISIT-TABLE | Plaintiff Medical Provider Visits |
| PL-MED-PRVD-TOT-BILL-BALANCE | Plaintiff Medical Providers Total Bill Balance |
| PL-NF-ADJ-ADDRESS-BLOCK_NO_NAME | No Fault Adjuster Address block without name |
| PR-ATTY-ADDRESS-BLOCK | Prior Attorney Address Block |
| PR-ATTY-ADDRESS-HORIZ | Prior Attorney Address Horiz |
| PR-ATTY-FIRM-ADDR1 | Prior Attorney Law Firm Address1 |
| PR-ATTY-FIRM-ADDR2 | Prior Attorney Law Firm Address2 |
| PR-ATTY-FIRM-ADDR3 | Prior Attorney Law Firm Address3 |
| PR-ATTY-FIRM-ADDRESS-BLOCK | Prior Attorney Law Firm Address Block |
| PR-ATTY-FIRM-ADDRESS-HORIZ | Prior Attorney Law Firm Address Horiz |
| PR-ATTY-FIRM-CITY | Prior Attorney Law Firm City |
| PR-ATTY-FIRM-STATE | Prior Attorney Law Firm State |
| PR-ATTY-FIRM-ZIP | Prior Attorney Law Firm Zip |
| SET-AMOUNT-CASE-TOTAL | Case Total Settlement Amount |
| SET-FIRM-FEE-CASE-TOTAL | Case Total Firm Fee Amount |
| SET-NET-TO-CLIENT-AMT-CASE-TOTAL | Case Total Net Settlement Amount To Client |
| USER-CNTY | Current User County |
| USER-EMAIL | Current User Email |
| USER-FAX | Current User Fax |
| USER-FIRST-NAME | Current User First Name |
| USER-INIT | Current User Initial |
| USER-LAST-NAME | Current User Last Name |
| USER-NAME | Current User Name |
| USER-PHONE | Current User Phone |
| USER-PREFIX | Current User Prefix |
| USER-SUFFIX | Current User Suffix |

New/Updated Reports

- Number of reports were modified to exclude headers in the Excel export to simplify sorting/searching in Excel.
- Insurance Company Report – Added additional report parameters/filters including Insurance Type and Open/Close status.

Insurance Company Report

| | | | |
|------------------------------------|-------------------------------------------------------------------|----------------------|--------------------------------------|
| Open/Closed | Open <input type="button" value="v"/> | Status | All <input type="button" value="v"/> |
| Case Type | All <input type="button" value="v"/> | Staff | All <input type="button" value="v"/> |
| Case Group | All <input type="button" value="v"/> | Insurance Company of | All <input type="button" value="v"/> |
| Insurance Company Name Begins With | <input type="text"/> | Insurance Type | All <input type="button" value="v"/> |
| SelectColumns | Plaintiff, Case Type, Case Statu <input type="button" value="v"/> | | |

- Adjudged Cancelled Appointments Report – Adjudged To Date was added to the report.
- Case Notes – New report that allows you to get and export brief summary and all notes for multiple cases (comma-separated list of cases).

| <u>Case Notes</u> | | | Date: 2/28/2016 | Page 1 of 4 12:27 PM |
|-----------------------------------------------------|-------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------|
| Case#: 4006 | Plaintiff: <i>[Redacted]</i> Carly Phone: (307) 224-6161 | Insurance Company: <i>[Redacted]</i> Defendant Law Firm: <i>[Redacted]</i> | | |
| Court/Docket#: 1:15-cv-00000-RR-VVP; 7/15/15 015 | | Defendant Attorney: <i>[Redacted]</i> Esq. Phone: (718) 224-1938 | | |
| Date | Staff | Note | | |
| 2/16/2016 2:36 PM | <i>[Redacted]</i> Alison J. | Spoke to client. She is going to get back to me with her availability in March to come to NY instead of tomorrow. | | |
| 2/3/2016 3:33 PM | <i>[Redacted]</i> Alison J. | Thank you. | | |

- Settlement Report – Case Status filter was added.
- Cases In Status – Support for different status types was added as well as number of new columns.
- Overdue Tasks Report – Filter for Open/Closed cases was added.
- Lien Report – new filter added – “Lien Name Contains”

Other Changes

- Support for PDF templates was introduced. Now SmartAdvocate allows you to turn fillable PDFs into templates that can be automatically populated with information from the system.
Brief introduction video - <https://recordings.join.me/147NLCYs706z3sLhQCroyA> (use Chrome to view it in the browser).
- Scheduling of the workplan item can now be based on the Federal or State court dates (in addition to regular calendar dates).

Set the Due Date of the Item

After the Incident Date (DOI)

By 10 Federal Days, 0 Months, 1 Years

And then add additional 5 State Days

If due date is a weekend or holiday, move it to the first work day Before holiday

Calendar
Calendar
Federal
State

Holidays can be configured under Admin -> Picklist maintenance -> Holidays.

- New UDF field type “Combo Box” was added. It combines dropdown with ability to type in custom valued.
- When updating appointments ability to notify only added or removed participants was added:

Select From All Contacts

All

Attending

Email will be sent to the attendees To added/removed participants only

- Ability to send appointments to people not in the system by providing their email address was added.

Additional attendees emails:

- Ability to email generated document when generating medical records requests on the Medical Providers page was added.

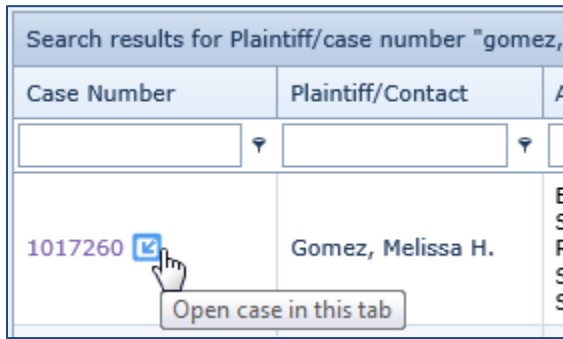
Confirm Follow Up Date(s)

Default Follow Up Date: 03/29/2016

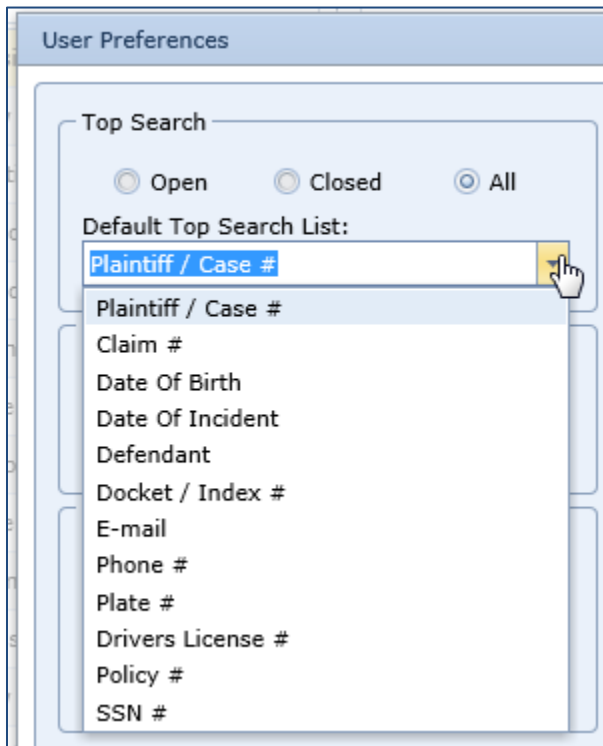
Print document Open document for edit

Email document Email document(PDF)

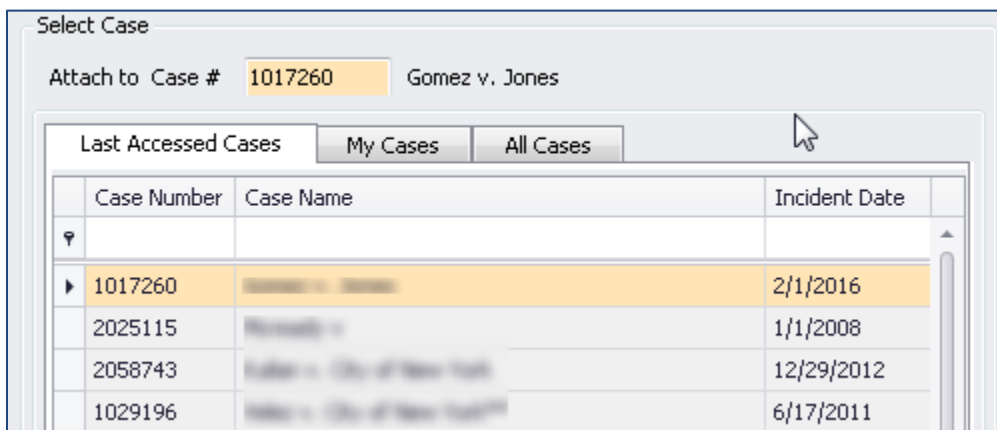
- On the top search results page ability to open case in the same tab was added. This way if you are sure that you found the right case you can view it without opening a new tab.



- Ability to select the default type for the top search was added to the User Preferences.



- New System Parameter was added to allow showing pending activities (appointments) on the Summary Screen in the reversed order.
- Edit dialog for Retainer and Referral grids will now show Created/Modified by information.
- Outlook plugin now has an option (set in registry) to prevent automatic selection of the most recent case by default.
- Outlook plugin now shows incident date when selecting a case.



- Ability to mark calendar appointments as “Add day event” was added.

Start time: * 02/28/2016 Sun 12:00 AM

End time: * 02/28/2016 Sun 11:59 PM

All day event

Configure Recurrence

- Mass Status update on the Case Browse Results page now allows you to update different types of statuses (Sub-status, M1 - M3, etc.).
- Ability to select only specific document categories/subcategories and document direction for email notifications about new document attachments was added to the User Preferences.

Email Notifications

Notify me when:

- Case is automatically assigned to me
- Case is assigned to me by staff
- One of my cases is closed or reassigned
- Workflow is assigned to me
- Task I created is completed
- Documents are attached to my cases
- Attach the document to email
- Select document categories/direction
- Text messages are received for my cases
- SOLs are added/modified in my cases

Only Notify About

Incoming Outgoing Memo

| Category |
|-------------------------------------------------------------------|
| <input type="checkbox"/> Appeals |
| <input type="checkbox"/> Arbitration/Mediation |
| <input type="checkbox"/> Attorney Fees |
| <input type="checkbox"/> Bankruptcy |
| <input type="checkbox"/> Checks |
| <input type="checkbox"/> Closed |
| <input checked="" type="checkbox"/> Court |
| <input type="checkbox"/> Defendant |
| <input type="checkbox"/> Defendant Attorney (DO NOT USE FOR BAR C |
| <input type="checkbox"/> Defendant Insurance Company |
| <input type="checkbox"/> Department of Veterans Affairs |
| <input type="checkbox"/> Disability |

- New email notification about SOL modifications was added. Users can enable/disable this notification in the user preferences.

SOLs are added/modified in my cases

- Ability to configure SQLs with to include incident day in calculations (minus one day) was added to Case Type administration page.

State: New Jersey

Year: 2

Month: 0

Day: 0

Subtract one day:

Calculate From: Incident

Update Cancel

- Multiple new items were added to Admin -> Picklist maintenance page.

- Shortcut (Alt-S) to send an email was added.
- Multiple new UDF types were added:
 - Table
 - Question Table
 - Combobox