SmartAdvocate®

Did you know that with the most recent release of SmartAdvocate you can configure your system to allow for the selection of Case Status(s) that only apply to cases in a specific Group? This powerful feature can help to eliminate data entry errors by limiting the choices to specific items you designate. For example, in your Auto Accident cases you may have statuses defined such as "Demand Pack Prepared," "Demand Made," or "Under Insured Arbitration Scheduled." Statuses, such as the foregoing, may not apply in your Mass Tort Cases, so you may not want them to be available.

You can configure your Case Statuses to activate this feature by doing the following:

Go to Admin, Picklist Maintenance, Case Statuses. Select and edit the status you want to work with and then select the Case Group(s) from the drop-down list. Thereafter, only cases in the group(s) designated will have that status available for selection. Note also that unless this configuration is done, by default, all statuses that were defined in *Status Setup* will be available in all cases.