

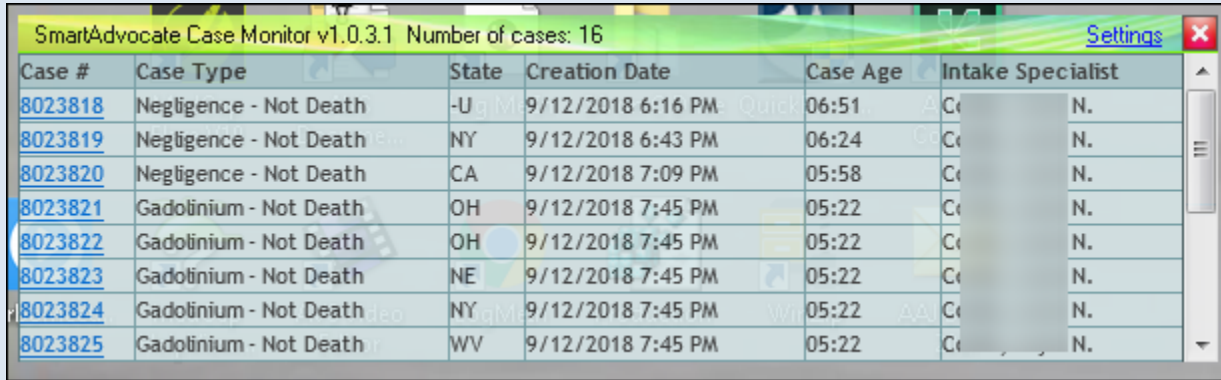
SmartAdvocate®

Tip of the Week

Did you know that SmartAdvocate has a ‘Case Monitor Widget?’

The SmartAdvocate Case Monitor Widget is a Windows monitor that displays recent intakes (cases/leads) that were automatically created and have not yet been personally handled by your office staff. These are cases that have been created via integrations with services such as web site, chat, answering service, etc. The widget is designed to be always visible in a corner of your screen so that cases that are created through automated services do not fall through the cracks. The Widget is a SmartAdvocate plugin and displays the ***Number of Cases, the SmartAdvocate Case number, Case Type, State, Creation Date, Case Age and Intake Specialist*** in a grid. (See Figure 1 below). These are all new cases that are in one of the designated “Intake” Statuses (*currently statuses that have ‘Presign’ in the name*) with one note entered (i.e., the initial note automatically entered in the case by SmartAdvocate when a case is created). Once a case is moved to a different status, or another note is added to the case, it will no longer display in the widget.

Figure 1



The screenshot shows a software window titled "SmartAdvocate Case Monitor v1.0.3.1 Number of cases: 16". The window contains a table with the following columns: Case #, Case Type, State, Creation Date, Case Age, and Intake Specialist. The table lists 8 cases, all with a creation date of 9/12/2018. The first two cases are "Negligence - Not Death" and the remaining six are "Gadolinium - Not Death". The states listed are -U, NY, CA, OH, OH, NE, NY, and WV. The case ages range from 06:51 to 05:22. The Intake Specialist column shows "N." for all cases. A "Settings" button is visible in the top right corner of the window.

Case #	Case Type	State	Creation Date	Case Age	Intake Specialist
8023818	Negligence - Not Death	-U	9/12/2018 6:16 PM	06:51	N.
8023819	Negligence - Not Death	NY	9/12/2018 6:43 PM	06:24	N.
8023820	Negligence - Not Death	CA	9/12/2018 7:09 PM	05:58	N.
8023821	Gadolinium - Not Death	OH	9/12/2018 7:45 PM	05:22	N.
8023822	Gadolinium - Not Death	OH	9/12/2018 7:45 PM	05:22	N.
8023823	Gadolinium - Not Death	NE	9/12/2018 7:45 PM	05:22	N.
8023824	Gadolinium - Not Death	NY	9/12/2018 7:45 PM	05:22	N.
8023825	Gadolinium - Not Death	WV	9/12/2018 7:45 PM	05:22	N.

The Widget is installed from a zip file (CaseMonitorSetup.zip) that is usually located in the Plugins Folder (folder where Outlook, Word, etc. plugins are located).

In addition to the aforementioned Zip file needed for the actual installation, you will also need to supply your SmartAdvocate Web Service URL. *(The URL is probably the same URL you would use if you remotely access SmartAdvocate using the SmartAdvocate App. You will need to verify the URL with your IT).*