

SmartAdvocate®

Tip of the Week

Are you taking full advantage of the “Show/Hide Columns” feature in SmartAdvocate?

The Show/Hide Columns feature is available on most screens in a case (e.g., Documents, Notes, Liens, Disbursements -Case Expenses, Negotiation/Settlement, Medical Providers, etc.). Quite often, there are additional columns you can add to the grid to show additional information. Here is an example on the Negotiation/Settlement page:

The screenshot displays the SmartAdvocate interface for the Negotiation/Settlement page. It features two main data tables: 'Negotiations' and 'Settlements'. A 'Column Chooser' dialog is open over the Settlements table, allowing users to select additional columns to display. The 'Show/Hide Columns' button in the bottom right of the Settlements table is circled in red.

Negotiations									
Date	Plaintiff	Negotiated by	Negotiating With	Demand	Offer	Authorized	Settlement	Note	Action
11/19/2018	Hinds, Mandy	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$1,000,000.00	\$150,000.00	\$0.00			
11/8/2018	Hinds, Mandy	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$675,000.00	\$350,000.00	\$0.00			

Settlements									
Date	Plaintiff	Settled by	Settlement With	Settlement	Gross Attorney Fee	Gross Settlement	Amount Distributed	Action	
11/30/2018	All	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$825,000.00	\$275,000.00	\$825,000.00	\$825,000.00 (multiple dates)		

Column Chooser:

- Amount Received
- Check Expected Date
- Comments
- Date Of Distribution
- Disbursements
- Documents
- Escrow Account
- Net to Client
- Prior
- Referrer

The pop-up box (Column Chooser), superimposed over the distribution list, was accessed by clicking the ‘show/hide’ button in the bottom right corner of the page. Additional columns can be ‘dragged’ from the Column Chooser list to the column headings (or columns can be removed by doing the reverse). The screen shot below shows the same page from the Settlement screen, but with the ‘Fee Recorded’ and ‘Net to Client’ columns added to the grid.

Negotiations												
Date	Plaintiff	Negotiated by	Negotiating With	Demand	Offer	Authorized	Settlement	Note	Action			
11/19/2018	Hinds, Mandy	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$1,000,000.00	\$150,000.00	\$0.00						
11/8/2018	Hinds, Mandy	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$675,000.00	\$350,000.00	\$0.00						
9/7/2018	Hinds, Mandy	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$1,000,000.00	\$250,000.00	\$0.00						
Page 1 of 1 (4 items) Show/Hide Columns												
Settlements												
Date	Plaintiff	Settled by	Settlement With	Settlement	Firm Fee	Fee Recorded	Gross Attorney Fee	Gross Settlement	Amount Distributed	Net to Client	Date Of Distribution	Action
11/30/2018	All	Simpson, Claude R., Esq.	Ins. Company: GEICO Type: Liability Primary \$50,000/\$100,000 Defendant: Ramirez, Juanita Insured: Ramirez, Juanita Claim #: HY203984 Adjuster: Lewis, Stacy	\$825,000.00	\$267,500.00	\$267,500.00 (11/30/2018)	\$275,000.00	\$825,000.00	\$825,000.00 (multiple dates)	\$486,213.73		
				\$825,000.00	\$267,500.00			\$825,000.00	\$825,000.00			
Page 1 of 1 (1 items) Show/Hide Columns												

Here is another example shown on the Notes page. The second screen shot shows the same page with the ‘Modified By’ and ‘Date Modified’ columns added to the grid. (Note: The first screen shot below shows the ‘Column Chooser’ dialog box activated).

- General
- Summary
- Incident
- Critical Deadlines
- Court
- Calendar
- Disbursements
- Case Value
- Critical Comments
- Documents
- Emails
- Investigations
- Court Rules
- Negotiation/Settlement
- Notes**
- Photographs
- Retainer/Referral
- Client Portal
- Tasks
- Timeline
- WorkPlans
- Caption
- Case UDF
- Plaintiff
- Summary
- Medical Providers
- Insurance
- Vehicles
- Employment

CS180088 - Miss Hinds, Mandy -v- Miss Ramirez, Juanita **Auto-Not Mun-Not Death** (Cross Over , Intersection) 4/10/2018 **Attorney:** Simpson, Claude **Paralegal:** DeJesus, Lourdes

All Notes (117) Activity (4) Adjuster (9) Attorney Note (1) Case (5) Deposition (2) Discovery (2) eMail (5) File Review (2) General Comments (3) Intake (1) Investigations (22) Legal Research (1) Medical Records (17) Negotiation (4) Other Insurance (1) Outgoing Text Message (2) Payment received (1) Plaintiff - Contacted (2) Plaintiff - Left Electronic Message for Plaintiff (7) Task (25) Treating History (1)

Notes							Export
Date	Created By	Related Contacts	Note	Type	Action		
11/19/2018 1:28 PM	Simpson, Claude R., Esq.		Plaintiff: Hinds, Mandy Ins. Company: GEICO Type: Liability Primary Insured: Ramirez, Juanita Claim #: HY203984 Demand: \$1,000,000 Offer: \$150,000	Negotiation			
11/19/2018 1:25 PM	Simpson, Claude R., Esq.		Medical Records (Received) Hospital Record FROM Abbeville General Hospital	Esq. for Hinds, Mandy received	Medical Records		

Column Chooser

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Actions

Modified By

Modified Date

Plain Text Note

Shared in CP

Staff

SmartAdvocate® Cases: Open Closed All Case # / Plaintiff

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

General Note Quick Note Message Appointment Task E-Mail Barcode Templates Attach Retain Close

CS180088 - Miss Hinds, Mandy -v- Miss Ramirez, Juanita Auto-Not Mun-Not Death (Cross Over, Intersection) 4/10/2018 Attorney: Simpson, Claude Paralegal: DeJesus, Lourdes

All Notes (117) Activity (4) Adjuster (9) Attorney Note (1) Case (5) Deposition (2) Discovery (2) eMail (5) File Review (2) General Comments (3) Intake (1) Investigations (22) Legal Research (1) Medical Records (17) Negotiation (4) Other Insurance (1) Outgoing Text Message (2) Payment received (1) Plaintiff - Contacted (2) Plaintiff - Left Electronic Message for Plaintiff (7) Task (25) Treating History (1)

Add New Note Clear Filter Notes Export

Date	Created By	Modified By	Modified Date	Related Contacts	Note	Type	Action
11/19/2018 1:28 PM	Simpson, Claude R., Esq.				Plaintiff: Hinds, Mandy Ins. Company: GEICO Type: Liability Primary Insured: Ramirez, Juanita Claim #: HY203984 Demand: \$1,000,000 Offer: \$150,000	Negotiation	
11/19/2018 1:25 PM	Simpson, Claude R., Esq.	Simpson, Claude R., Esq.	11/19/2018 1:26 PM		Medical Records (Received) Hospital Records requested by Simpson, Claude R., Esq. for Hinds, Mandy received FROM Abbeville General Hospital	Medical Records	

Page 1 of 2 (117 items) 1 2 Show/Hide Columns

Here is a brief video clip showing how to add and remove columns as explained above:

[Link to YouTube video]