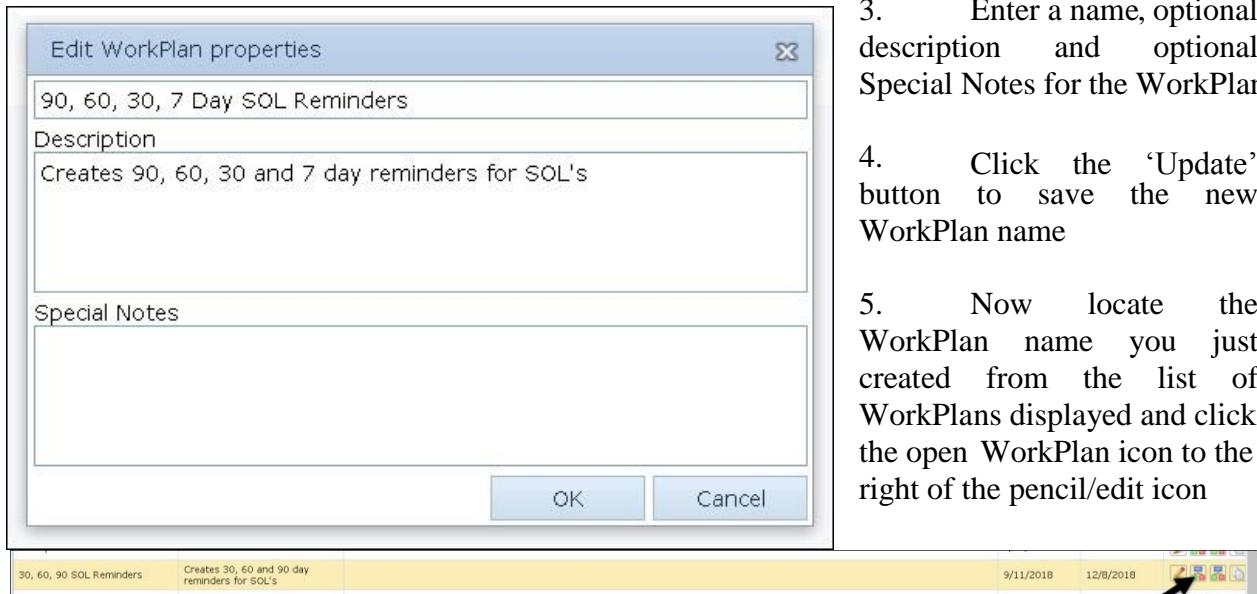


How to Set SOL Reminders Using WorkPlans

This week's tip, '*How to Set SOL Reminders using WorkPlans*,' is a little bit off the beaten path, so to speak. It is a little different from our usual Tip of The Week, because it is directed primarily towards the Admin person in your firm who generally creates WorkPlans and is a bit longer than our usual tip.

Here at SmartAdvocate, we are frequently asked 'Does SmartAdvocate give automatic deadline reminders?' or 'How can I get a 'pop-up' reminder 30 days before the SOL expires?' for example. While they won't create 'pop-ups' in the strictest sense, you can create simple WorkPlans that can automatically populate 'reminders' of upcoming SOLs. The following example shows how to create a WorkPlan for Auto Accident Cases that will automatically populate 90, 60, 30 and 7 day 'SOL Reminders.' (*Please note that in this example the reminders are populated based on a 3 year SOL. You will need to make the appropriate adjustments based on the actual SOL for your Case Type and/or jurisdiction*)

1. From the Admin Tool Bar, select WorkPlans, then WorkPlan Management from the resulting drop-down menu
2. Click the 'New WorkPlan' button in the top left corner of the screen

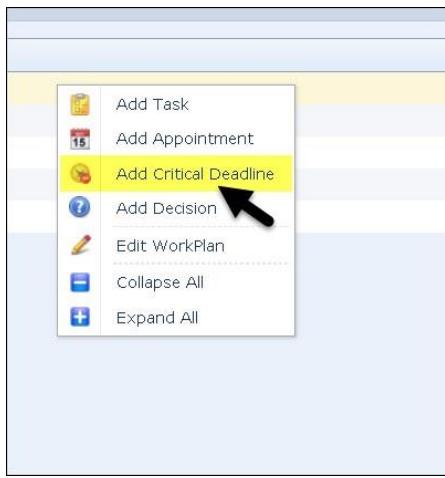


6. Right click on the WorkPlan name and select 'Add Critical Deadline' from the drop-down menu

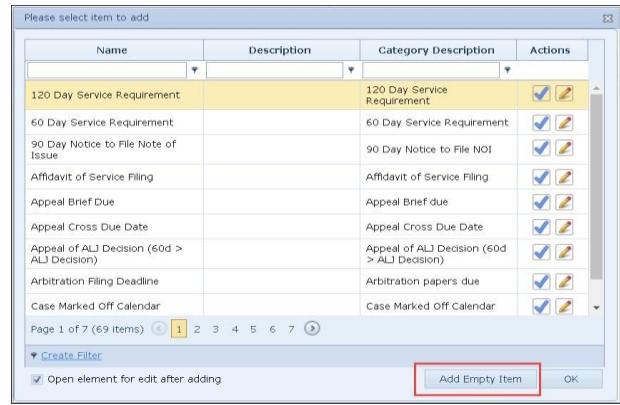
3. Enter a name, optional description and optional Special Notes for the WorkPlan

4. Click the 'Update' button to save the new WorkPlan name

5. Now locate the WorkPlan name you just created from the list of WorkPlans displayed and click the open WorkPlan icon to the right of the pencil/edit icon



7. Click the ‘Add Empty Item’ button from the dialog box



8. For the General Information, enter a Name (such as 90 Day SOL Reminder), select CriticalDeadline for the Type and enter an optional Description and optional Special Instructions if desired

9. Click the ‘Scheduling Setting’ Tab and click the drop-down for ‘Item Entered Date’ and select the ‘Incident Date (DOI)’ option. In the box to the right of ‘And then add additional’ enter the number of days **less 90** days for the actual SOL. In the following example, I entered 1005 which represent 90 days less than the total number of days for a 3-year SOL (a three-year statute is 1095 days)

10. Click the ‘Contacts Information’ tab and then click the ‘New Contact’ button

11. Click the ‘Role from the Case’ check box and then select ‘Attorney’ from the drop-down. Check the box for ‘Is responsible for the WorkPlan item.’ Click the ‘Update’ button.

Repeat steps 10 and 11, selecting different roles, if desired. In our example, we selected Paralegal as the

second role from the drop-down. (*In the foregoing examples, the staff members assigned as Attorney and Paralegal in the case will have the 90-day SOL Reminder sent to them.*)

Edit WorkPlan Item Assignee

Please choose the contact type :

Role from the Case Specific contact

Attorney

Is responsible for the WorkPlan item. Is acting as assigner of WorkPlan item.

Check to notify on status changes.

Update Cancel

12. Click the ‘OK’ button to save the entered information

[Repeat steps 6 through 12 for a 60-day, 30-day and 7-day reminder if desired. For each subsequent reminder in step 9, make the appropriate calculation for 60 days, 30 days and 7 days less than the actual SOL as appropriate]

Name	Description
90, 60, 30, 7 Day SOL Reminders	Creates 90, 60, 30 and 7 day reminders for SOLs 90 SOL Reminder Populates a 90 day deadline prior to the SOL deadline date 60 Day SOL Reminder Populates a 60 day deadline prior to the SOL deadline date 30 Day SOL Reminder Populates a 30 day deadline prior to the SOL deadline date 7 Day SOL Reminder Populates a 7 day deadline prior to the SOL deadline date

Now, assign the WorkPlan to your cases based on the desired criteria. In this example, we will assign the WorkPlan to a specific Auto Accident Case Type.

13. To do so, go to Admin, WorkPlans, WorkPlan Assignments, then click the ‘New WorkPlan Assignment’ button in the top left corner of your screen

WorkPlan assignment rule

90, 60, 30, 7 Day SOL Reminders

Assign the selected workplan(s) to the case

90, 60, 30, 7 Day SOL Reminders

When case status changes to one of the selected statuses

Please select the status(es). Can't be empty.

only if case type is one of the selected types

Auto-Not Mun-Not Death

only if case is in one of the selected states

New York

only if case belongs to one of the selected offices

Please select the case office(es). Will be ignored if empty.

Update Cancel

14. Create a name/role for the WorkPlan Assignment (*In this example we called the assignment ‘90, 60, 30, 7 Day SOL Reminder’*)

15. Select the WorkPlan you just created from the drop-down list of WorkPlans (in our example, ‘90, 60, 30, 7 Day SOL Reminders’)

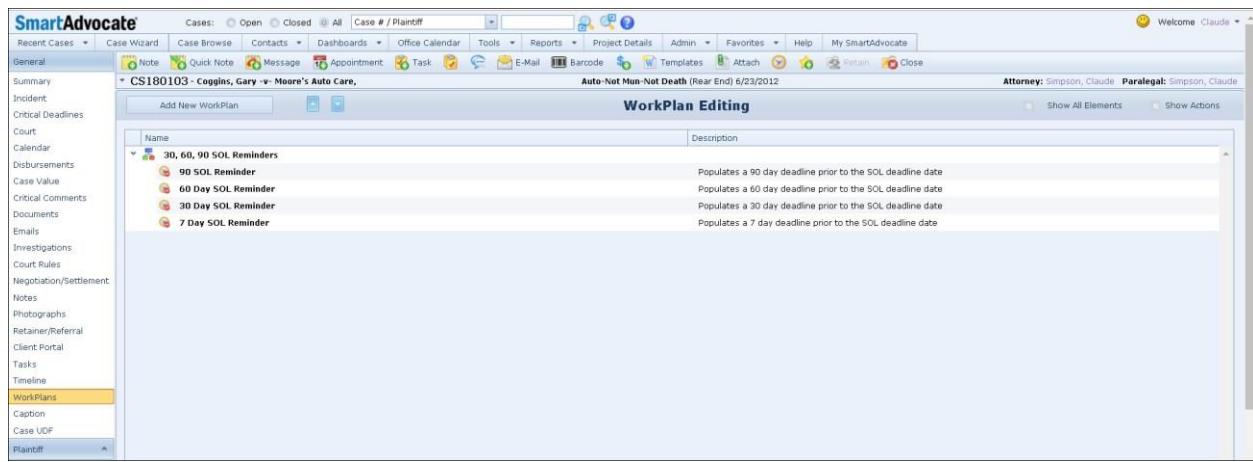
16. Select the Case Type(s) and State(s) from the drop-down lists that you want to assign the WorkPlan to (*here we want to limit the assignment to specific Case Type(s) and State(s) since SOLs may be Case Type and*

(State Specific)

17. Click the ‘Update’ button to save your selections and assignment (*Tip: You may want to assign the WorkPlan to one specific case initially so that you can verify that the WorkPlan is functioning as expected prior to assigning it to all your cases. Go to Admin > WorkPlans > WorkPlan in Cases to do so*)

In our example, once a new case of the type *Auto-Not Mun-Not Death AND* located in *New York* is entered into SmartAdvocate, the WorkPlan will be automatically assigned to it.

Once the SOL Reminder WorkPlan is assigned to a case, the WorkPlan page in the case will look similar to the following:



And the SOL Reminders may look like this on the Summary Screen of the case:

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

Welcome Claude

General Summary CS180103 - Coggins, Gary v. Moore's Auto Care, Auto-Nut Mun-Nut Death (Rear End) 6/23/2012 Attorney: Simpson, Claude Paralegal: Simpson, Claude

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 Courts / Dockets

Summary Polk county Superior Court 201648-2014 Judge: Murphy, Michael

Medical Providers

Insurance

Vehicles

Employment

Injuries Plaintiffs

Other Providers Plaintiff # Primary Role Phone # Insurance Co. Adjuster Coverage Law Firm

Coggins, Gary (English) Plaintiff (P)-Owner/Operator (828) 123-4567 State Farm Insurance (Liability Primary) Claim #: Lewis, Stacy \$300,000 Gother & Thatcher, PLLC

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

Status Discovery 11/17/2018 (21 days)

Sub Status Nurse Review Complete 7/23/2018 (138 days)

Physical File Office fileroom 12/6/2018 (2 days)

Incident Date 6/23/2012 Case State Georgia

Open 7/23/2012 New York

Wanted/Accepted Date 7/23/2012 Estimated Value Not Set

Retainer Date 7/23/2012 Liability Coverage/Code \$1,600,000 /

Expected Resolution Total Settlement \$625,000

Next Deadline 3/25/2015 Next SOL 6/23/2014

Paid Advertising Comcast

Serious Injury Corporate/Municipal Defendant Liens Plaintiff Attorney

Edit Case

Last Notes

Plaintiff - Left Electronic Message for Plaintiff - 12/6/2018 7:05 PM by Simpson, Claude R., Esq.

Called Client - Left message & Sent email

Court - 12/6/2018 7:02 PM by Simpson, Claude R., Esq.

Scheduling order sent to opposing counsel

Medical Records - 12/6/2018 7:01 PM by Simpson, Claude R., Esq.

Order medical records

Attorney Note - 12/6/2018 7:00 PM by Simpson, Claude R., Esq.

Tasks

12/5/2018 Send Summons & Complaint Preparation Package to Client

12/5/2018 Prepare Summons and Complaint

5/17/2019 Court Rule event: Trial

Pending Critical Deadlines Add Defendant SOL | Add Plaintiff SOL | Add Critical Deadline

3/25/2015 Populates a 90 day deadline prior to the SOL deadline date

4/24/2015 Populates a 60 day deadline prior to the SOL deadline date

5/22/2015 Populates a 30 day deadline prior to the SOL deadline date

6/16/2015 Populates a 7 day deadline prior to the SOL deadline date