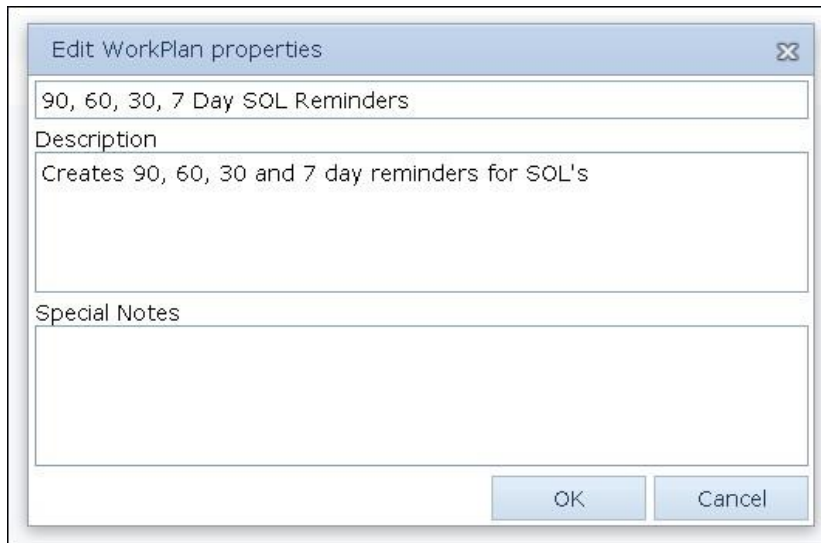


How to Set SOL Reminders Using WorkPlans

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 3year 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



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

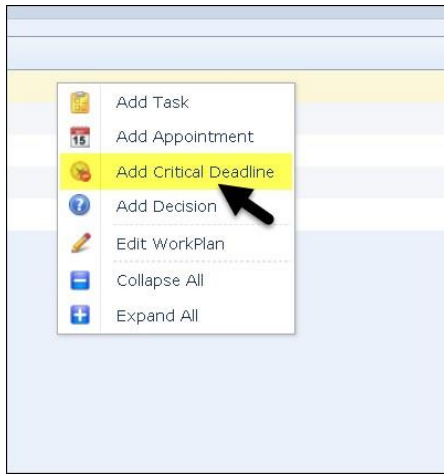
4. Click the 'Update' button to save the new WorkPlan name

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



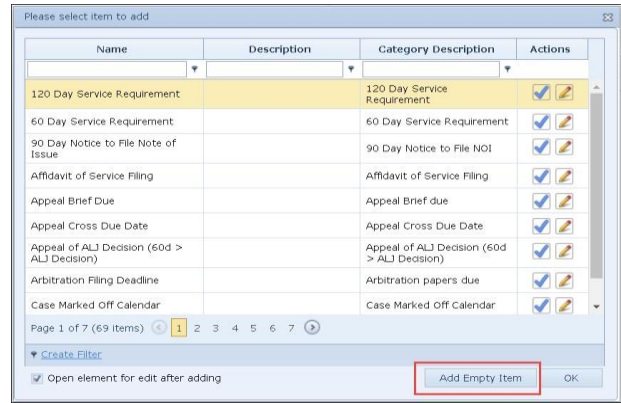
Name	Description	Start Date	End Date	Actions
30, 60, 90 SOL Reminders	Creates 30, 60 and 90 day reminders for SOL's	9/11/2018	12/8/2018	 

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

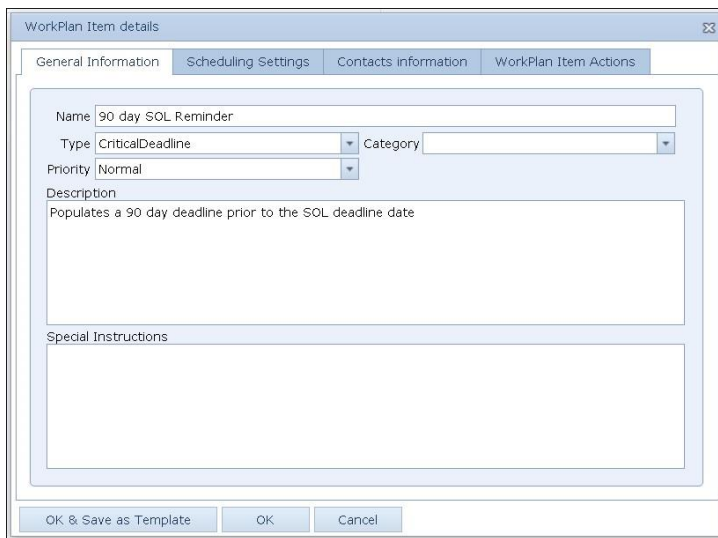


7. Click the 'Add Empty Item' button from the dialog box

Click the 'Add Empty Item' button from the dialog box

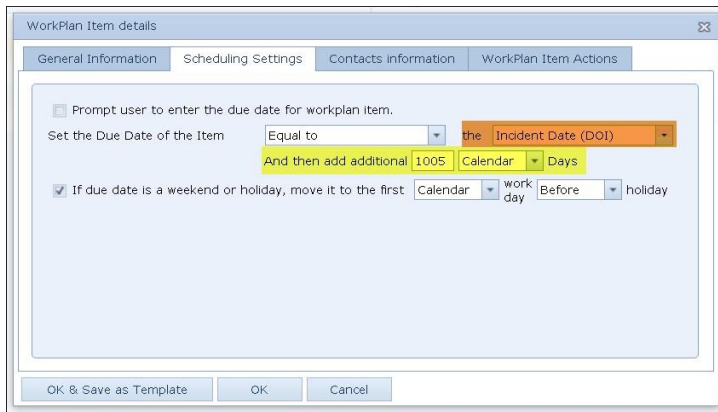


8. For the General Information, enter a Name (such as 90 Day SOL Reminder), select CriticalDeadline for the Type and enter an optional Description and optional Special Instructions if desired



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 that the total number of days for a 3-year SOL (a three-year statute is 1095 days)

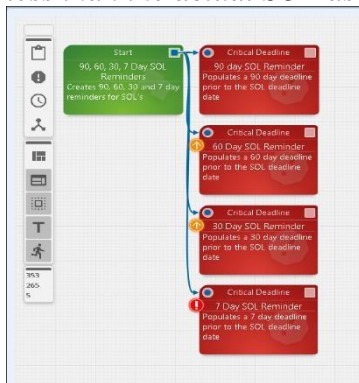
10. Click the 'Contacts Information' tab and then click the 'New Contact' button



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).*

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]



Here is the completed WorkPlan shown in both the traditional and graphical (drag-and-drop) views

Name	Description
30, 60, 90 SOL Reminders	Creates 30, 60 and 90 day reminders for SOL's
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

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’)

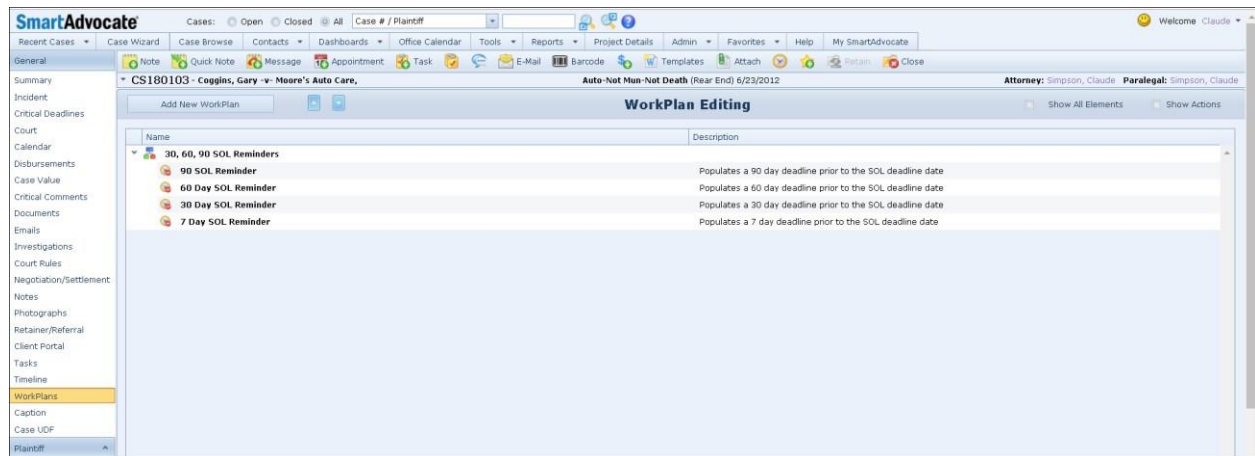
16. Select the Case Type(s) and State(s) from the drop-down lists that you want to assign the WorkPlan to (*here we want to limit the assignment to specific Case Type(s) and State(s) since SOLs may be Case Type and*

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

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

Summary CS180103 - Coggins, Gary -v- Moore's Auto Care, Auto-Not Mun-Not Death (Rear End) 6/23/2012 Attorney: Simpson, Claude Paralegal: Simpson, Claude

Incident Status: Discovery 11/17/2018 (21 days) Incident Date: 6/23/2012 Case State: Georgia
 Court Sub Status: Nurse Review Complete 7/23/2018 (138 days) Open: 7/23/2012 Office: New York
 Calendar Physical File: Office floorroom 12/6/2018 (2 days) Wanted/Accepted Date: 7/23/2012 Estimated Value: Not Set
 Disbursements Retainer Date: 7/23/2012 Liability Coverage/Code: \$1,600,000 /
 Case Value Expected Resolution: Next Deadline: 3/25/2015 Next SOL: 6/23/2014
 Total Settlement: \$625,000

Paid Advertising Comcast
 Serious Injury Corporate/Municipal Defendant Liens Plaintiff Attorney Edit Case

Staff Add | Show History Last Notes Add

Paralegal	Baez, Dayhanara	Plaintiff - Left Electronic Message for Plaintiff - 12/6/2018 7:05 PM by Simpson, Claude R., Esq. Called Client - Left message & Sent email
Case Manager	Bldy, Natalya	Court - 12/6/2018 7:02 PM by Simpson, Claude R., Esq. Scheduling order sent to opposing counsel
Primary Attorney	Simpson, Claude, Esq.	Medical Records - 12/6/2018 7:01 PM by Simpson, Claude R., Esq. Order medical records
Primary Paralegal	Simpson, Claude, Esq.	Attorney Note - 12/6/2018 7:00 PM by Simpson, Claude R., Esq.

Pending Appointments

12/10/2018	Trial - All Issues	Jury Trial on all issues, Jury trial requested by plaintiffs
1/9/2019	Deposition - Plaintiff Expert - First Appearance	By Court Order
5/24/2019	Court Rule event	Trial Day of Trial

Tasks Add

12/6/2018	Send Summons & Complaint Preparation Package to Client	Simpson, Claude	✓
12/6/2018	Prepare Summons and Complaint	Baez, Dayhanara	✓
5/17/2019	Court Rule event: Trial	Simpson, Claude	✓

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

Courts / Dockets

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

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

Plaintiff