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

9/11/2018

12/8/2018

Edit WorkPlan properties	3. Enter a name, optional description and optional
90, 60, 30, 7 Day SOL Reminders	Special Notes for the WorkPlan
Description Creates 90, 60, 30 and 7 day reminders for SOL's	4. Click the 'Update' button to save the new WorkPlan name
Special Notes	Cancel5.Nowlocatethe5.NowlocatetheWorkPlannameyoujustcreatedfromthelistofWorkPlansdisplayedandclicktheopenWorkPlanicontocancelrightofthepencil/editicon

2. Click the 'New WorkPlan' button in the top left corner of the screen

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

30, 60, 90 SOL Reminders

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



Click the 'Add Empty Item' button from the dialog

Name	Description	Category Description	Actions
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120 Day Service Requirement		120 Day Service Requirement	V
60 Day Service Requirement		60 Day Service Requirement	1
90 Day Notice to File Note of Issue		90 Day Notice to File NOI	I
Affidavit of Service Filing		Affidavit of Service Filing	 Image: A start of the start of
Appeal Brief Due		Appeal Brief due	
Appeal Cross Due Date		Appeal Cross Due Date	🖌 🌽
Appeal of ALI Decision (60d > ALI Decision)		Appeal of ALI Decision (60d > ALI Decision)	
Arbitration Filing Deadline		Arbitration papers due	1
Case Marked Off Calendar		Case Marked Off Calendar	
Page 1 of 7 (69 Items) 🕜 📘 2	3 4 5 6 7 🕥		
Create Filter			

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

					í.
General In	nformation	Scheduling Settings	Contacts information	WorkPlan Item Actions	
Name	90 day SOL	Reminder			
Туре	CriticalDeadli	ine	▼ Category		-
Priority	Normal		-		
Descrip	tion				
Populat	es a 90 day o	deadline prior to the SO	I deadline date		
Special	Instructions				
Special	Instructions				
Special	Instructions				
Special	Instructions				
Special	Instructions				
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Special	Instructions				

WorkPlan Item details				
General Information Sc	heduling Settings	Contacts information	WorkPlan Item Act	lions
E Dramat upor to optio	the due date for w	orlenion item		
Set the Due Date of the	the due date for w	orkpian item.	the Incident Date (D	(10)
Set the Due Date of the	And the	add additional 1005	Calendar Davs	(OI)
y Ir due date is a week	end or noliday, mov	e it to the first <u>Calenda</u>	r ▼ day Betore	noliday
OK & Save as Template	ок	Cancel		

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*]

	90, 60, 30, 7 Day 50, Remarks: Creater No. 66, 50 and 7 Day remoters (6, 50 and 7 Day remoters (6, 50 and 7 Day remoters (6, 50 and 7 Day Creater No. 66, 50 and 7 Day Creater No.	Here is the completed WorkPlan shown in both the traditional and graphical (drag-and-drop) views						
	Cribcal Deadline	80	WorkPlan Editing	🖌 Show Actions 📜 🔟				
т	30 Day SOL Reminder Populates a 30 day deadline	Name	Description					
齐	prior to the SOL deadline date	 30, 60, 90 SOL Reminders 	Creates 30, 60 and 90 day reminders for SOL's	*				
353		😼 90 SOL Reminder	Populates a 90 day deadline prior to the SGL deadline date					
265 5	🖌 💽 Critical Deadline 📃	😼 60 Day SOL Reminder	Populates a 60 day deadline prior to the SOL deadline date					
	7 Day SOL Reminder Populates a 7 day deadline	😼 30 Day SOL Reminder	Populates a 30 day deadline prior to the SOL deadline date					
	prior to the SOL deadline date	🚱 7 Day SOL Reminder	Populates a 7 day deadrine 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*

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:

SmartAdvoca	ate c	ases: O Open (Closed 🧿 All [Case # / Plaintiff	•		8.0	ost Twees of two		Nex 1241			<mark>()</mark>	/elcome Claude * 🕯
Recent Cases * Ca	ase Wizard Casi	e Browse Conta	cts 🔹 Dashboa	rds 🔹 Office Caler	dar Tools '	Reports	Project De	tails Admin • Fav	vorites 🔹 Help 🛛 My	y SmartAdvoc	clean			
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Case Value	A 3										Next Deadline	3/25/2015	Next SOL	6/23/2014
Critical Comments	Paid Advertisin	g Comcast												
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Negotiation/Settlement	Case Manager Blidy, Nataliya					18	Court - 12/6/2018 7:02 PM by Simpson, Claude R., Esq.					18		
Notes	Primary Attorney	imary Attorney Simpson, Claude, Esq.				18	Medical Records - 12/6/2018 7:01 PM by Simpson, Claude R., Eso.							19
Photographs	Primary Paralegal		Simpson	, Claude, Esq.		18	Order medical records Attorney Note - 12/6/2018 7:00 PM by Simpson, Claude R., Esg.							2.00
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Vehicles										6/16/20	15 Populates a 7 day d	leadline prior t	o the SOL deadline date	18
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