



## Suggested Document and Notes Categories

All areas of TrialWorks can be setup with Document Categories. These categories make it easier to filter out information that might be difficult to see because of the amount of data contained on the Tab. Document categories are found on the Correspondence, Pleadings, Legal/Discovery, Depositions, Hearings/Motions, Subpoena, Medicals, Ancillary, Emails, and Notes. Consistency is important across all areas of TrialWorks but especially with Categories

|                        |                   |                      |
|------------------------|-------------------|----------------------|
| Accident               | Court             | Inspection           |
| Accidents-Prior        | Court Filing      | Insurance            |
| Additional Info Needed | Court Reporter    | Intake               |
| Adjuster               | Coverage          | Investigation        |
| Annuity                | Demand            | Issues               |
| Answer                 | Deposition        | Jurisdiction         |
| Appearance             | Directions        | Jury Instructions    |
| Appointment            | Disability        | Liability            |
| Arbitration            | Disbursement      | Lien                 |
| Authorization          | Discovery         | Mediation            |
| Background Check       | Distribution      | Medical              |
| Bills                  | District Attorney | Medical Bills        |
| Calendar Call          | Docket            | Medical Providers    |
| Case Closed            | Documents         | Medical Records      |
| Case Meeting           | Economic Damages  | Medical Symptoms     |
| Case Notes             | Employment        | Meeting              |
| Case Turndown          | Estate            | Monthly Contact      |
| Cause of Action        | Estate            | Offer                |
| Check                  | Evaluation        | Offer Accepted       |
| Claims                 | Evidence          | Phone Call           |
| Client Appointment     | Exhibits          | Phone Call - Monthly |
| Client Documents       | Expert            | Police Report        |
| Client Follow-up       | Expert Testimony  | Policy Information   |
| Client Information     | Facts             | Policy Limits        |
| Client Meeting         | Fee Reduction     | Pre-Trial            |
| Client Related         | Filing            | Prior Attorney       |
| Client Update          | Follow-Up         | Process Server       |
| Conference Call        | Hearing           | Property Damage      |
| Conflicts Check        | HIPPA             | Receipt              |
| Costs                  | IME               | Referral             |
| Counter-Offer          | Injuries          | Reject               |



|                       |                       |                     |
|-----------------------|-----------------------|---------------------|
| Release               | Settlement            | Summary Judgment    |
| Report                | Settlement Authority  | Tax Documents       |
| Representation        | SOL                   | Transcript          |
| Research              | Statement             | Travel Arrangements |
| Review                | Status                | Trial               |
| Scheduling Conference | Strategy              | Wage Loss           |
| Service of Process    | Structured Settlement | Witness             |

If your firm would like to import this list into your Document Categories list, please contact our TechSupport department.