VERSION 10.3 UPDATES

Features

- **TrialWorks APP** now available through Apple iTunes for iPad and iPhone (contact Techsupport for system requirements. *Current TrialWorks Maintenance & Support* is required). Android release expected shortly.
- New **Social Security Module** – track Social Security cases from Intake through Awards & Payments (available on **Clients > Mass Torts**).
- New **E-Service on Attorneys**. Features added to **Other Attorney** (on Other Parties) for Attorney Service Email. Email Multiple Documents includes "Serve Documents on Attys on Service List". Email formatted to include Court Title, Plaintiff v. Defendant, Case #, Document name(s), Sender name and telephone number. Subject contains: SERVICE OF COURT DOCUMENTS – Case #.
- Add field to **Case Retainer** for Case Service Email (for your firm service email)
- **Bookmarks**:
    - AllAttorneys bookmarks added the email address to: AllAttys, AllAttorneys, AllAttyWrap, AllAttysGroupBy, AllAttorneysGroupFirm
    - Add AttyServiceEmail
    - Add CaseServiceEmail
    - Add Requested Date = DOR
    - Add Health Care Provider = HCProvider
    - Add InsurancePhone

Improvements

- **TrialWorks Outlook Addin**
    - Add new button called "**Re-File Tagged Items**" (place next to existing button "File Pending Items").
        - When user clicks this button All tagged e-mails in the folder "TrialWorks\To be Filed" will be re-filed to TrialWorks regardless if they were previously filed or not. Add confirmation prompt after they click the new "Re-file Pending Items" button.
    - Add new logic for **Email Auto-Filing**:
        1. Select case based on File No in Subject ("Include File #" must be ON in Global Settings)
        2. Select case based on Claim No in Subject ("Include Claim#" must be ON in Global Settings).
        3. Select Case based on Sender/Recipients Information in the following order
            - a. Email Address

- b. Name
- c. Domain name
  - o Add functionality to Filter options on both the Funnel icon or right-click menu where the user can enter either an Acct # or File # or Case/Index # and then populate the Case Name drop down with the matching case.
- Add new **Global Setting** "Numeric Fee Only" under formatting tab. When turned ON users will only be able to enter numeric data in the field "Case Retainer info > Fee".
- Made improvements to **Docket Reminders** to populate list more quickly when the form opens.
- **Reports** – Add new Reports and Sub-menus
  - o Menu: Financial > Fees, Fees Earned by Status
  - o Menu: Financial > Fees, Fees Earned by Judge
  - o Menu: Case > Statistics, Average Days to Case Resolution
  - o Menu: Case > Statistics, Case Status by Month and Year
  - o Menu: Case > Statistics, New Cases by Month and Year
  - o Current Case > Closing Statements
    - - Closing Statement [existing Report]
    - - Closing Statement Showing Reduction
    - - Closing Statement Liens and Medical
  - o Case > Status > Open/UC > Manager Report
  - o Client > Client Intake Report
- Add option to **Global Settings** to run the Conflicts Check Report automatically based on contacts entered in the New Case Wizard. Once the report is generated it is saved on the Memos tab by the Conflict Name.
- Add to **Document Categories** the following Notes Categories
  - o File Review
  - o Review
  - o Signup
- Add to **Contact Types** the following new type
  - o Treating Physician
- **Intake Cases Manager**
  - o Add ability to print Certified Mail from Intake Case Wizard.
    - - Add "Certified Mail" button in Section 2 Under Documents
    - - The Certified Mail is being sent to the Contacted By contact
    - - Include Intake ID on the label

- **FileIT**
  - Add functionality to **FileIT** to add a search text box where the user can enter either an Acct # or File # or Case/Index # and then populate the Case Name drop-down with the matching case.
  - Add the ability to search by Other Parties partyname
- If a case is marked Billable on the **Case Retainer Tab** all time entries created in the case should be marked Billable by default. This would override the Global Setting for Billable time.
- Add the date to the description in the **Transfer Multiple Document** window.

Error

- Correct error on **Email Tab** when using Email Search – Binoculars it caused a Timeout error when searching a large amount of emails.
- Correct error on Meds Additional where an incorrect total of records appears on **Meds Tab.**
- Improve retrieval time of Global Address list for Invitees on **Case Retainer Tab.**
- Correct error in **Index Search** to be able to use filter by Tab.
- Correct error when creating a new Intake Case in the **Intake Cases Manager** and proceeding to generate a document results in the "Actions Taken" field not being updated with "Documents Created". This only happens if the document is created without the Intake Wizard being closed at least once.
- Allow user to delete an intake record in the **Intake Cases Manager.**
- Increase the characters to show the complete case name in the **FileIT Transaction Report.**
- Correct error when a user tried to file email attachments using **FileIT** by dragging and dropping the attachments to FileIT would cause two files if the attachment file name contained a comma.
- Correct error where **FileIT** is adding duplicated names in the TO field of the email sent after transfer for each document link attached to the email. If there are 3 documents, the names are triple.