LEVEL 1 USER TRAINING

HOUR 2 (ONLINE)

# Case Info

Administrative Tab for your case where you would find in-house assignments

* Case Status
	+ UC=Under Consideration, Open, Closed, Rejected, Referred Out, On Calendar, Substitute or Settled
* Division
	+ Set List and Library.
* File number
	+ Text field with options in global settings for configuration. Not a required field.
* Case Name
	+ Commonly Last name, first name of client, also Last name, first name vs. Defendant
* Liability
	+ Used to categorize the type of case (i.e., auto, medical malpractice, breach of contract).
* Referral Fields
	+ The name of the individual or firm that referred you the matter
* Rainmaker
	+ The attorney who is responsible for bringing the case to the firm
* Invitees
	+ The staff members who should always be included on calendar invites or documents filed into TrialWorks with FileIT
* Attorney
	+ The name of the primary attorney for this matter.
* Support Fields
	+ Support1 is often the Associate working on the case
	+ Support2 is often the paralegal
	+ Support3 is often the legal assistant
* Acct#
	+ Shortened value of file # used for copy codes
	+ Can be auto-generated using +
* Valuation
	+ What the case is worth
* Case Stage
	+ Where the case exists in the handling process (pre-lit, lit, discovery)
* Date of Rep
	+ When the client was signed
* Type of Fee
	+ Flat, Hourly, Contingent, Blend
* Fee
	+ Fee percentage or the actual fee earned at the end of the case
* Status/Sub-Status/Sub-Status1
	+ Add additional case status information to a given matter. (e.g., case progression)
	+ Status Codes can be sent to the Notes tab to create a reference for the case progression updates.
* Date Created
	+ Date case created in TrialWorks
* Additional Status
	+ Another optional field to keep track of status or stage
* Date Closed
	+ Auto populated when the closed Case Status is chosen
* JCNo
	+ An additional court case number used in New York
* Office Location
	+ Pulled from User Default Values when the case is created
* Created by
	+ Name of user that created the case
* Case Password
	+ Lightest form of security on case
* Firm Name
	+ Used in highest left of security
* Storage Date
	+ Date the file is sent to storage
* Location
	+ Location of Storage of file
* Button Bar
	+ Each tab contains a button bar along the bottom of the window. The button bar on the Case Info tab provides additional options for marketing, settlement and Extra Info.
* Case Budget
	+ Cost Budget
	+ Time Budget
* Marketing
	+ Saw AD on TV
	+ Marketing Source
	+ Other Marketing
* Settlement Info
	+ Case Settlement
	+ Clients Settlements
* Extra Info
	+ Priors
	+ Synopsis
	+ Liability Memo
	+ Damages
	+ Extras
	+ QuickNote
		- Enter a quick note that will pop-up upon accessing case (e.g., do not call at work)
		- Cases can also have a QuickNote added from the Master Client
	+ Retainer No
	+ Closing No
	+ Sub Atty
	+ Coversheet Re
	+ No Fault Form Filed
	+ Intake Atty
* View in NCW
* Delete (a Case)
* Checkboxes give you another tab or text fields associated to what you have checked
	+ Death Case, Appeals, Trial Material, Billable Case, Government Claim, Non-PI Matter, CPI, Labor

# Summary

* Gives you a snapshot of information pulled from tabs within the case
	+ Case Info
	+ Client
		- Click on a party name and the fields for SOL, Injuries and Case Facts updates
	+ Other Parties
		- Click on a party name and the fields for Insurance updates
	+ Negotiations
		- See Demands and Offers
	+ Insurance
		- As of Version 11.1c only pulls Other parties insurance policies