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