TrialWorks Version 11.2

Template Updates and Bookmarks

New Template and Bookmark features have been added to Version 11.2 to make document creation more effective. The newest Bookmarks are included for the generation of Settlement Statements and other Cost Detail information

# What’s New

## Bookmarks by Tab

### Cost Tab

**CostTotal**  --  pull Total Cost

**CostTotalReduction**  --  pull Total Reduction

**CostTotalAmountDue**  --  pull Total Amount Due

### Medical Tab

*By Client*

**MedsAmtWaived**  --  pull Amount Waived

**MedsFinalBalanceDue**  --  pull Final Balance Due

*By Other Party*

**OtherMedsOwed**  --  pull Total Bill

**OtherMedsPaid** --  pull Amount Paid

**OtherMedsTotal** --  pull Balance

**OtherMedsAmtWaived** --  pull Amount Waived

**OtherMedsFinalBalanceDue** --  pull Final Balance Due

*By Case*

**CaseMedsOwed** --  pull Total Bill

**CaseMedsPaid** --  pull Amount Paid

**CaseMedsTotal** --  pull Balance

**CaseMedsAmtWaived** --  pull Amount Waived

**CaseMedsFinalBalanceDue** --  pull Final Balance Due

### Insurance/Liens Tab

**TotalPolicyLimit** --  pull Total Policy Limit

**LiensTotalAmount** --  pull Total Amount of Lien

**LiensTotalReduction** --  pull Total Reduction

**LiensTotalAmountDue** --  pull Total Amount Due

### Settlement Info (Case Settlement)

**SettInfoExpectedSettlementDate** --  pull Expected Settlement Date

**SettInfoSettlementDate** --  pull Settlement Date

**SettInfoSettlementAmount** --  pull Settlement Amount

**SettInfoTotalAllClients** --  pull Total Settlement (All Clients)

## Bookmarks by Client

### Costs Tab  --  cost amount should pull from cost tab amount due field by party

*By Client*

**ClientCostDetail\_Total**  --  itemize each cost separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 07/15/2018 | Kennedy Consulting | $5,000.00 |
| 07/22/18 | MRO | $30.00 |
| 07/29/2018 | MRO | $5.00 |
| 08/01/2018 | Seaview Ortho | $665.00 |
|   |   |   |
| Total Costs: |   | $5,700.00 |

**ClientCostDetail**  --  itemize each cost separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 07/15/2018 | Kennedy Consulting | $5,000.00 |
| 07/22/18 | MRO | $30.00 |
| 07/29/2018 | MRO | $5.00 |
| 08/01/2018 | Seaview Ortho | $665.00 |
|   |   |   |

**ClientCostDetailGB\_Total**  --  group by payee

|  |  |
| --- | --- |
| Kennedy Consulting | $5,000.00 |
| MRO | $35.00 |
| Seaview Ortho | $665.00 |
|   |   |
| Total Costs: | $5,700.00 |

**ClientCostDetailGB**  -- group by payee

|  |  |
| --- | --- |
| Kennedy Consulting | $5,000.00 |
| MRO | $35.00 |
| Seaview Ortho | $665.00 |

### Medical Tab  --  medical amount should pull from the medical tab final balance due field by client

*By Client*

***ClientMedicalDetail\_Total*** *--  itemize each medical provider separately sorted by date oldest to newest*

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |
|   |   |   |
| Total Outstanding Medical bills |   | $3,875.00 |

**ClientMedicalDetail**  --  *itemize each medical provider separately sorted by date oldest to newest*

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |

**ClientMedicalDetailGB\_Total**  -- group by provider

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |
|   |   |
| Total Outstanding Medical bills | $3,875.00 |

**ClientMedicalDetailGB**  --  group by provider

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |

### Medical Tab  --  medical amount should pull from the medical tab final balance due field by other party

*By Other Party*

**OtherMedicalDetail\_Total**  -- *itemize each medical provider separately sorted by date oldest to newest*

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |
|   |   |   |
| Total Outstanding Medical bills |   | $3,875.00 |

**OtherMedicalDetail**  -- *itemize each medical provider separately sorted by date oldest to newest*

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |

**OtherMedicalDetailGB\_Total**  -- group by provider

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |
|   |   |
| Total Outstanding Medical bills | $3,875.00 |

**OtherMedicalDetailGB**  --  group by provider

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |

### Insurance/Liens Tab  --  lien amount should pull from lien tab amount due field by party

*By Client*

**ClientLienDetail\_Total**  --  itemize each lienholder separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |
|   |   |   |
| Total Liens |   | $3,875.00 |

**ClientLienDetail**  --  itemize each lienholder separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |

**ClientLienDetailGB\_Total**  --  group by lien holder

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |
|   |   |
| Total Liens | $3,875.00 |

**ClientLienDetailGB**  --  group by lienholder

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |

## Bookmarks by Case

### Costs Tab  --  cost amount should pull from cost tab amount due field

**CaseCostDetail\_Total**  --  itemize each cost entry separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 07/15/2018 | Kennedy Consulting | $5,000.00 |
| 07/22/18 | MRO | $30.00 |
| 07/29/2018 | MRO | $5.00 |
| 08/01/2018 | Seaview Ortho | $665.00 |
|   |   |   |
| Total Costs: |   | $5,700.00 |

**CaseCostDetail**  -- itemize each cost entry separately by date oldest to newest

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| --- | --- | --- |
| 07/15/2018 | Kennedy Consulting | $5,000.00 |
| 07/22/18 | MRO | $30.00 |
| 07/29/2018 | MRO | $5.00 |
| 08/01/2018 | Seaview Ortho | $665.00 |
|   |   |   |

**CaseCostDetailGB\_Total**  --  group by payee

|  |  |
| --- | --- |
| Kennedy Consulting | $5,000.00 |
| MRO | $35.00 |
| Seaview Ortho | $665.00 |
|   |   |
| Total Costs: | $5,700.00 |

**CaseCostDetailGB**  --  group by payee

|  |  |
| --- | --- |
| Kennedy Consulting | $5,000.00 |
| MRO | $35.00 |
| Seaview Ortho | $665.00 |

### Medical Tab  --  medical amount should pull from medical tab final balance due field

**CaseMedicalDetail\_Total**  --  itemize each medical provider separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |
|   |   |   |
| Total Outstanding Medical bills |   | $3,875.00 |

**CaseMedicalDetail**  --  itemize each medical provider separately sorted by date oldest to newest

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| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
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| Mount Sinai | $3,500.00 |
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| Total Outstanding Medical bills | $3,875.00 |

**CaseMedicalDetailGB**  -- group by provider

|  |  |
| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |

### Insurance/Liens Tab  --  lien amount should pull from lien tab amount due field

**CaseLienDetail\_Total**  --  itemize each lienholder separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |
|   |   |   |
| Total Liens |   | $3,875.00 |

**CaseLienDetail**  --  itemize each lienholder separately sorted by date oldest to newest

|  |  |  |
| --- | --- | --- |
| 06/12/2018 | Mount Sinai | $3,500.00 |
| 07/25/18 | Abe Sinister, MD | $250.00 |
| 08/03/2018 | Abe Sinister, MD | $125.00 |

**CaseLienDetailGB\_Total**  -- group by lien holder

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| --- | --- |
| Mount Sinai | $3,500.00 |
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|   |   |
| Total Liens | $3,875.00 |

**CaseLienDetailGB**  -- group by lien holder

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| --- | --- |
| Mount Sinai | $3,500.00 |
| Abe Sinister, MD | $375.00 |

## Template Wizard

TrialWorks Version 11.2 now includes an intensive change in how users create templates. A state-of-the-art Office Addin provides a link directly to the TrialWorks database to add bookmarks directly to any document. Choose the tab to generate a template and a searchable list of fields appear. Don’t want to create a template? You can add the field data directly to your document with an alternative search.

### TrialWorks Toolbar

The Template Wizard has been added to the TrialWorks Office Addin Toolbar



Choosing the Template Wizard, you are prompted to pick the type of template you need to create



A list of bookmarks appears – you can search by bookmark name, field name or tab

Choose a Case, Client, Other Party, Caption and Insurance to Test your Template



Choose to Test your template by choosing a Case. This allows you to modify the Bookmarks before saving your template.



Save your template with a new File Name, document type, a description that shows when the user looks at the list of templates and the Template Category

### How to Insert Bookmarks

Bookmarks can be searched for or located in the list. You can click the information icon on the right of a field to discover where the bookmark originates and what data will complete when inserted. An example of the CorrPhone bookmark is shown below:



Place your cursor in the document where you want to add the Bookmark and once you’ve located the Bookmark in the list, double-click on the Bookmark name to add it to your document.

#### Use Quick Access

Quick Access has been provided to common bookmarks to make template creation easier

Choose to add the Date or one of the other Popular, Client, Other Party or Caption Bookmarks

#### Add a Prompt



If the data you need to pull into your template doesn’t exist in TrialWorks, you can choose to add a prompt. This allows your user to complete the section with optional text needed.

### How to Insert Data

If you need to add additional data to a document, you can choose the option from the TrialWorks Office Addin to **Insert Data**.

Populating the options in the fields sets the criteria for the case data to be inserted into your document.

*Note*: the case name field is filtered for All Active Cases by default.

### Save your Document as a Template

If you’ve created a new document and now want to save it as a Template complete the fields for File Name, Save as Type, Description (what you’ll see when you pick the template), Library and Template.