
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

TrialWorks LLC

Tel 305.357.6500

Fax 305.357.6499

1550 Madruga Ave, Ste 508

Coral Gables, FL 33146

<http://www.trialworks.com>

training@trialworks.com



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

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

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

CaseMedicalDetailGB_Total -- group by provider

Mount Sinai	\$3,500.00
Abe Sinister, MD	\$375.00

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

Mount Sinai	\$3,500.00
Abe Sinister, MD	\$375.00

Total Liens \$3,875.00

CaseLienDetailGB -- group by lien holder

Mount Sinai	\$3,500.00
Abe Sinister, MD	\$375.00



TEMPLATE WIZARD

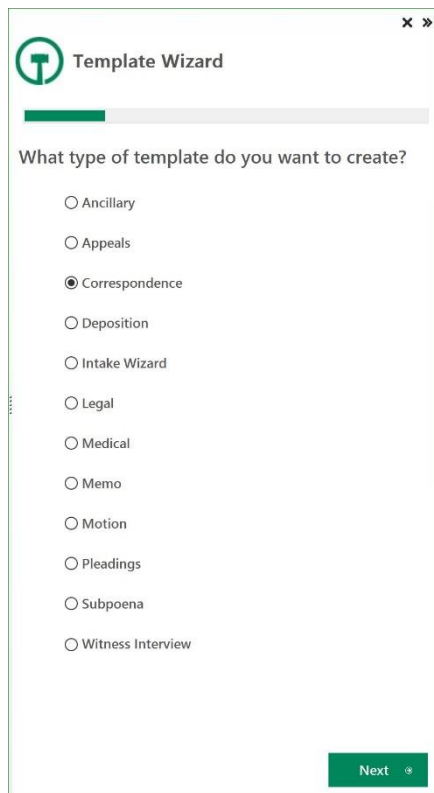
TrialWorks Version 11.2 now includes an intensive change in how users create templates. A state-of-the-art Office Addin provides a link directly to the TrialWorks database to add bookmarks directly to any document. Choose the tab to generate a template and a searchable list of fields appear. Don't want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

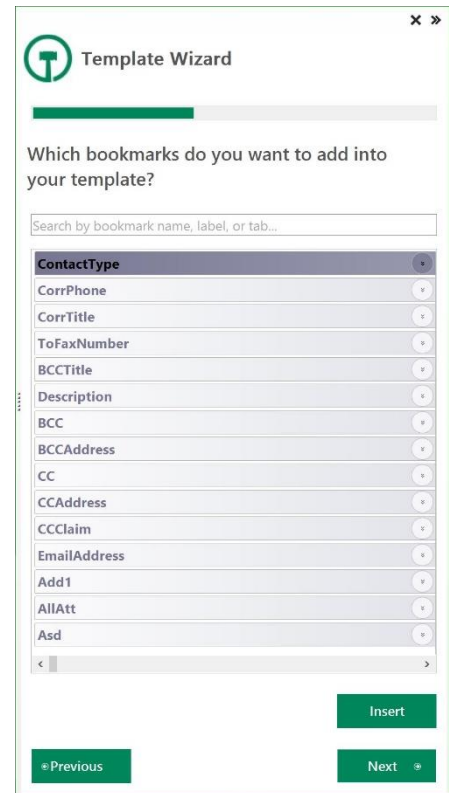


Choosing the Template Wizard, you are prompted to pick the type of template you need to create



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:

Which bookmarks do you want to add into your template?

Search by bookmark name, label, or tab...

ContactType

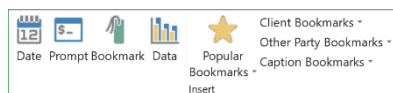
CorrPhone

Template Library: **Correspondence**
Tab: **Contacts**
Bookmark: **CorrPhone**
Sample Data: **3055555624**

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

Prompt Details

Title:

Input:

OK Cancel

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

Insert Data

Template Library:

Case Name:

Client:

Other Party:

Caption:

Insurance:

Get Data

Search by bookmark name, label, or tab...

Insert

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

Insert Data

Template Library: Correspondence

Case Name: Philips, Robert v. Anderson, Aaron

Client: Robert A. Phillips

Other Party: Aaron L. Anderson

Caption: Robert Phillips

Insurance: Andrews, Karl (USAA)

Refresh

Search by bookmark name, label, or tab...

- ContactType
- CorrPhone
- Template Library: **Correspondence**
- Tab: **Contacts**
- Bookmark: **CorrPhone**
- CorrTitle

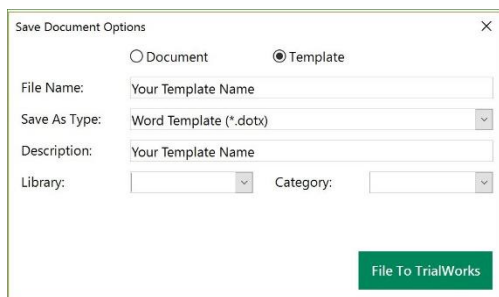
Populating the options in the fields sets the criteria for the case data to be inserted into your document.

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.



Save Document Options

Document Template

File Name: Your Template Name

Save As Type: Word Template (*.dotx)

Description: Your Template Name

Library: Category:

File To TrialWorks

Contact the TrialWorks Training Department for assistance with the new Template Wizard and Bookmarks at 305-357-6500.

