

TrialWorks Dashboard Library

Custom reports (aka, Dashboards) are created by our Data Conversion Department. Requests are submitted by completing our [Dashboard Request Form](#), where users may request the **creation of any new dashboard reports** and/or the **modification of any existing dashboard reports**. Dashboard Services are delivered at the standard rate of \$120/hour.

The Dashboard Reports listed below are delivered with every new installation of TrialWorks at **no additional cost** to the Customer. Existing users may benefit from these dashboards by copying the code into their existing databases.

INSTRUCTIONS:

The code below may be highlighted, copied, and pasted into the SQL Query field to create the dashboard in your environment. From the Home Menu, simply click the Dashboard icon, click "Manage Views," and click the green plus sign to create a new dashboard. Name the Dashboard, provide a brief description, and paste the code in the SQL Query field. Close the door to save the new Dashboard, which will be available in the Dashboard Menu Dropdown.

1. Birthday List - Birthdays for all Clients
2. Docket Report - All - All Docket Entry Form Data
3. Docket Report - FastTrack - All Docket Entries including FastTrack Designation
4. Docket Report - Important Dates - All Dates from Date Info Button on Docket Tab
5. Docket Report - Appearances - All Docket Activities with Docket Category = Appearances
6. Call Log - Details from Call Log Entry Form
7. Captions View - All Cases - Sample View of Data from Caption Tab
8. Case List - Sample View of Data from Case Info Tab
9. Case List - Intake Cases Full View - All Details from Intake Cases Manager Wizard
10. Case List - Intakes List - Selected Fields from the Intake Cases Manager Wizard
11. Case Settlement Report - Settlement Information by Case
12. Client Mailing List - All Clients List for Mass Mailings
13. Client Settlement Report - Settlement Information by Client
14. Closed Cases - List of Closed Cases
15. Conflicts Report by Case - Contacts Associated with the Case
16. Contacts Full View - All Data from Contacts Entry Form
17. Contacts Mailing List - All Contacts List for Mass Mailings
18. Costs - Total Costs Report - Total Expenses by Case from Costs Tab
19. Insurance Report - All Insurance Information by Case
20. Liens Tracker - All Cases - Liens Data from Insurance/Liens Tab for All Cases
21. Liens Tracker - By Current Case - Liens Data from Insurance/Liens Tab By Current Case
22. Marketing and All Referral Sources - Data from Marketing and Referral Fields
23. Medical Cost Totals Report [EMSI] - Summary of Costs for Medicals [from EMSI Integration]
24. Medical Costs Totals Report - Medical Costs Totals by Case
25. Medical Provider Summary Report - All Medical Providers by Case
26. Medical Requests Outstanding - List of All Outstanding Medical Record Requests
27. Negotiations Tracker - All Cases - Data from Negotiations Tab for All Cases

- 28. Negotiations Tracker - By Current Case - Data from Negotiations Tab by Current Case Only
- 29. Other Parties Information - Data from Other Parties Tab
- 30. Referrals - Referral Information for All Cases, including Referral Fee, Type of Fee and Percentage
- 31. Service and Initial Pleadings - Filing of Initial Pleadings and Service Dates
- 32. SOL (Statute of Limitations) Report - SOL for All Open Cases
- 33. Timekeeper Report - Data from TimeKeeper Entry Form

Dashboard Title	Code
Birthday List	<pre> SELECT DISTINCT [First Name], [Last Name], [Address], [City], [State], [Zip], [DOB], MONTH(DOB) AS [Month], DAY(DOB) AS [Day], [Case Status Name] FROM udqClients INNER JOIN UdqCases ON udqCases.CaseID=udqClients.CaseID WHERE DOB IS NOT NULL ORDER BY MONTH(DOB), DAY(DOB) </pre>
Docket Report – All - All Docket Entry Form Data	<pre> SELECT [Case Name], CAST (CONVERT (varchar, Docket.Date, 101) AS datetime) AS Date, LTRIM(RIGHT(CONVERT(VARCHAR(20), Docket.time, 100), 7)) AS [Time], AssignedBy, Docket.AssignedTo, Docket.Description As Description, CASE WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'Yes') ELSE 'No' END AS Completed, DateCompleted, FileTab, CASE WHEN Docket.Remind = 1 THEN CONVERT(VARCHAR,'Yes') ELSE 'No' END AS Remind, [Days], CASE WHEN Docket.Date < GETDATE() THEN CONVERT(VARCHAR,'OVERDUE') WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'COMPLETED') </pre>

Dashboard Title	Code
	<pre> ELSE CONVERT(VARCHAR, DATEDIFF(DAY, GETDATE(), date)) END AS DaysLeft, Docket.Activity, CASE WHEN Docket.Adjourned = 1 THEN CONVERT(VARCHAR,'Yes') ELSE 'No' END AS Adjourned, AdjournedDate, Location, Details, udqcases.CaseId FROM Docket INNER JOIN udqCases ON Docket.CaseID=udqCases.CaseID ORDER BY [Case Name]</pre>
Docket Report - FastTracks	<pre> SELECT [Case Name], [Master Client], Attorney, [Support 1], [Status], CAST(CONVERT(varchar, Docket.Date, 101) AS datetime) AS Date, CONVERT(VARCHAR(8),Docket.time,108) AS Time, AssignedTo, Activity, Docket.Description As Description, FileTab, (CASE WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'Yes') ELSE 'No' END) AS [Completed?], DateCompleted, UDqcases.caseID FROM Docket INNER JOIN udqCases ON Docket.caseID=udqCases.caseID WHERE FileTab Like 'FT%' AND Completed=0</pre>
Docket Report - Important Dates	<pre> SELECT [Case Name], [File #], [Case Status Name], [Status], [Sub Status], [Liability], [Pre-trial Conf. Date], [Calendar Call],</pre>

Dashboard Title	Code
	<p>[Mediation/Settlement], [Arbitration], [Trial Date], [Second Trial Date], [Date of Filing], [Informational Stmt], [Add'l Parties Joined], [Mediation Deadline], [Pltf. Experts Disclosed], [Def. Experts Disclosed], [Appeal Date], [Trial Not Before Date], [RJI], [Note of Issue], [Status Conference], [Discovery], [Discovery Cut Off], [Case Management Conference], [First Client Meeting], [IME Completed], [Inform Court of Mediator], [Disp. Motions Sched], [Non-Disp. Motions Sch], [Binding Arbitration Date], [Motions in Limine], [Expert], [Lay Witness], [Deposition], [SJMotion], [Exhibits], [Trial Brief], [Jury Instructions], [Jury Inst./Sp. Verdict Deadline], [Statement of Cause], [Disp. Motions heard], [Non-Disp. Motions Heard], [Witness Exhibit Deadline], [Contract Court Approved], udqCases.CaseID</p> <p>FROM udqCases INNER JOIN udqCaseImportandDates ON udqCases.CaseID = udqCaseImportandDates.CaseID ORDER BY [Case Name]</p>
Docket Report - Appearances	<p>SELECT [Case Name], [File #], Liability,</p>

Dashboard Title	Code
	<pre> CAST(CONVERT(varchar, Docket.Date, 101) AS datetime) AS [Date], LTRIM(RIGHT(CONVERT(VARCHAR(20), Docket.time, 100), 7)) AS [Time], AssignedBy, Docket.AssignedTo, Docket.Description As Description, CASE WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'Yes') ELSE 'No' END AS Completed, DateCompleted, FileTab, CASE WHEN Docket.Remind = 1 THEN CONVERT(VARCHAR,'Yes') ELSE 'No' END AS Remind, Docket.Activity, Location, Details, udqcases.Caseld FROM Docket INNER JOIN udqCases ON Docket.CaseID=udqCases.CaseID INNER JOIN DocketCategory DC ON DC.Activity=Docket.Activity WHERE DC.Category LIKE 'Appearances%' ORDER BY [Case Name] </pre>
Call Log	<pre> SELECT [Case Name], [File #], [Master Client], [Save As] AS [Caller], CAST(CONVERT(varchar,StartDate,101) AS Datetime) AS [Call Date], LTRIM(RIGHT(CONVERT(VARCHAR(20), StartDate, 100), 7)) AS [Start Time], LTRIM(RIGHT(CONVERT(VARCHAR(20), EndDate, 100), 7)) AS [End Time], User AS [Author], [StatusNoteCode], [CalledFor], Calls.[Notes], udqCases.CaseID FROM Udqcases INNER JOIN Calls ON udqCases.CaseId=Calls.CaseID LEFT JOIN UdqContacts ON UdqContacts.ContactsID=Calls.ContactsId </pre>
Captions View - All Cases	<pre> SELECT UdqCases.[Case Name], [Master Client], </pre>

Dashboard Title	Code
	Plaintiffs, Defendants, [Case/Index#], Judge, [Court Name], [County/Venue] [Court Address], [Court Division] [Court City], [Court State], CourtZipCode, [Room No], Arbitrator, UdqCases.CaseID FROM udqCaptions INNER JOIN UdqCases ON UdqCases.caseID=udqCaptions.CaseID ORDER BY UdqCases.[Case Name]
Case List	SELECT [Case Name], [File #], [Date Created], [Created by], [Case Status Name], [Master Client], [Division], [Attorney], [Support 1], [Support 2], [Support 3], [Liability], [Sub Liability], [Referral], [Secondary Referral Source], [Rainmaker], [Referred Out], [Date Closed], [Status], [Status Note], [Sub Status], [Sub Note], [Sub Status1], [Sub Note1], [Priority Code], [Priority Note], [Additional Status], [CaseId]

Dashboard Title	Code
	FROM [dbo].[udqCases] Order By [Case Name]
Case List - Intake Cases Full View	SELECT * FROM udqIntakeCases Order By [Intake Case Name]
Case List - Intakes List	<pre> SELECT [Intake Case Name] [Intake File #], ContactedBy , InjuredParty, [Date Created], Referral, [Intake Status], [Status], [Status1], [Status2], [Liability], [SubLiability], [AssignedTo], Rainmaker, MarketingSource, (SELECT Division FROM IntakeCases WHERE IntakeCaseID=udqIntakeCases.IntakeCaseID) AS [Division], CASE WHEN TWCaseID >0 THEN 'Yes' ELSE 'No' END AS [Created in TW], [IntakeCaseID] FROM udqIntakeCases Order By [IntakeCaseID] </pre>
Case Settlement Report	<pre> SELECT [Case Name], [File #], [Master Client], [Case Status Name], [Status], [Sub Status], [Sub Status1], [Priority Code], [Liability], [Expected Settlement Date], [Settlement Date], [Settlement Amount], [Date Release Sent to Client], [Date Release Sent to Insurance], [Total Paid], [Balance], udqCases.CaseID FROM udqCases </pre>

Dashboard Title	Code
	INNER JOIN udqCaseSettlement ON udqCases.CaseID = udqCaseSettlement.CaseID ORDER BY [Case Name]
Client Mailing List	<pre> SELECT udqCases.[Case Name], [File #], [Party Name] AS [Client Name], [Address], [City], [State], [Zip], [E-mail], [Date Created], [Master Client], ContactsID, udqCases.CaseID FROM udqCases INNER JOIN udqClients ON Udqcases.CaseId=UdqClients.CaseID WHERE [Party Name] <> 'Party' AND [Party Name] IS NOT NULL ORDER BY udqCases.[Case Name] </pre>
Client Settlement Report	<pre> SELECT [Case Name], [File #], [Case Status Name] , [Master Client], [Status], [Sub Status], [Liability], [Client Name], Referral, [Expected Settlement Date], [Settlement Date], [Settlement Amount], [Total Settlement (All Clients)], [Date Release Sent to Client], [Date Release Sent to Insurance], [Total Paid], [Balance], udqCases.CaseID FROM udqCases INNER JOIN udqClientSettlement ON udqCases.CaseID = udqClientSettlement.CaseID ORDER BY [Case Name] </pre>
Closed Cases	<pre> SELECT [Case Name], [File #], Liability, </pre>

Dashboard Title	Code
	<p>Attorney, [Case Status Name], [Status], [Date Closed], udqCases.CaseId</p> <p>FROM udqCases WHERE [Case Status]=3</p> <p>ORDER BY [Case Name]</p>
Conflicts Report by Case	<p>SELECT udqCases.[Case Name], [File #], [Case Status Name], [Contact Type], LastName, FirstName, CompanyName, Address, City, State, ZipCode, PhoneNumber, DOB, Contacts.Notes</p> <p>FROM Contacts LEFT JOIN CaseContacts CC ON CC.ContactsID=Contacts.ContactsId LEFT JOIN Udqcases ON Udqcases.CaseID= CC.caseID LEFT JOIN ContactType CT ON Contacts.ContactsId=CT.ContactsId LEFT JOIN [Contact Types] ON CT.ContactTypesId= [Contact Types].[Primary]</p> <p>WHERE UdqCases.CaseID=dbo.fn_GetCurrentCaseID() ORDER BY [LastName],[FirstName]</p>
Contacts Full View	SELECT * FROM udqContacts ORDER BY [Save As]
Contacts Mailing List	<p>SELECT [dbo].[fn_GetFullName] (Title, FirstName, MiddleInitial, LastName, Suffix) AS [Full Name], CompanyName, Title, Address, City, State, ZipCode,</p>

Dashboard Title	Code
	<pre> dbo.fn_CleanPhoneNo(HomePhone) AS [Home Phone], dbo.fn_CleanPhoneNo(PhoneNumber) AS [Work Phone], dbo.fn_CleanPhoneNo(CarPhone) AS [Cell Phone], EmailAddress, DOB, Specialty, InternalType AS [Primary Type], [dbo].[fn_GetContactTypes](Contacts.ContactsI d, 0) AS [Types], Contacts.ContactsId FROM Contacts ORDER BY [Full Name]</pre>
Costs - Total Costs Report	<pre> SELECT [Case Name], [File #] , [Case Status Name] , [Status], [Sub Status], [Liability], [Total Cost], [Total Reduction], [Total Amount Due], udqCases.CaseID FROM udqCases INNER JOIN udqCostTotals ON udqCases.CaseID = udqCostTotals.CaseID ORDER BY [Case Name]</pre>
Insurance Report	<pre> SELECT [Case Name], [File #], [Master Client], InsType, Insurance.Party, Ins.CompanyName AS [Insurance Company], Adj.SaveAs AS [Adjuster], PolicyNo, ClaimNo, PolicyLimits, Deductable AS [Deductible], [InsuredParty], CoverageStartDate, CoverageEndDate,</pre>

Dashboard Title	Code
	<p>PercentCoverage, Insurance.Notes, udqCases.CaseId</p> <p>FROM udqCases INNER JOIN Insurance ON Insurance.CaseId = udqCases.CaseId INNER JOIN Contacts Ins ON Ins.ContactId = Insurance.InsuranceId LEFT JOIN Contacts Adj ON Adj.ContactId = Insurance.AdjusterId</p> <p>ORDER BY [Case Name]</p>
Liens Tracker - All Cases	<p>SELECT UdqCases.[Case Name], [File #], [Master Client], [Party Name], CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Claim Date], ClaimNo AS [Claim #], Rep.[Save As] AS [Lien Rep], Amount, Reduction, AmountDue, Holder.[Save As] AS [LienHolder Name], CASE WHEN FirmPaid=1 THEN 'Yes' ELSE 'No' END AS [Firm Paid?], DatePaid, FirmCheckNumber, Liens.Notes, UdqCases.CaseID</p> <p>FROM UdqCases INNER JOIN Liens ON UdqCases.CaseID=Liens.CaseID LEFT JOIN udqClients ON Liens.ClientID=Liens.ClientID LEFT JOIN UdqContacts Rep ON Rep.ContactID=Liens.LienRep LEFT JOIN UdqContacts holder ON holder.ContactID=Liens.NameOfLienHolder</p>
Liens Tracker - By Current Case	<p>SELECT UdqCases.[Case Name], [File #], [Master Client], [Party Name], CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Claim Date], ClaimNo AS [Claim #], Rep.[Save As] AS [Lien Rep],</p>

Dashboard Title	Code
	<pre> Amount, Reduction, AmountDue, Holder.[Save As] AS [LienHolder Name], CASE WHEN FirmPaid=1 THEN 'Yes' ELSE 'No' END AS [Firm Paid?], DatePaid, FirmCheckNumber, Liens.Notes, UdqCases.CaseID FROM UdqCases INNER JOIN Liens ON UdqCases.CaseID=Liens.CaseID LEFT JOIN udqClients ON Liens.ClientID=Liens.ClientID LEFT JOIN UdqContacts Rep ON Rep.ContactsID=Liens.LienRep LEFT JOIN UdqContacts holder ON holder.ContactsID=Liens.NameOfLienHolder WHERE UdqCases.CaseID=dbo.fn_GetCurrentCaseID() </pre>
Marketing and All Referral Sources	<pre> SELECT CASE WHEN UdqCases.[Case Name]> '0' THEN CAST([Case Name] AS CHAR(255)) WHEN [Case Name]IS NULL THEN CAST([Intake Case Name] AS CHAR(255)) END AS [Case Name], CASE WHEN [Case Name]> '0' THEN CaseMarketing.MarketingSource WHEN [Case Name]IS NULL THEN udqIntakeCases.MarketingSource END AS [MarketingSource], CASE WHEN [Case Name]> '0' THEN MTUMarketingSource WHEN [Case Name]IS NULL THEN udqIntakeCases.[Other Marketing Source] END AS [Other MarketingSource], CASE WHEN [Case Name]> '0' THEN udqCases.Referral WHEN [Case Name]IS NULL THEN udqIntakeCases.Referral END AS [Referral], CASE WHEN [Case Name]> '0' THEN udqCases.[Secondary Referral Source] WHEN [Case Name]IS NULL THEN udqIntakeCases.Referral2 END AS [Secondary Referral], UdqCases.CaseId </pre>

Dashboard Title	Code
	<pre> FROM udqCases LEFT OUTER JOIN CaseMarketing ON udqCases.CaseId=CaseMarketing.CaseID FULL OUTER JOIN udqIntakeCases ON udqCases.CaseId=udqIntakeCases.TWCaseID ORDER BY [Case Name] </pre>
<p>Medical Costs Totals Report [EMSI]</p>	<pre> SELECT UdqCases.[Case Name], Saveas AS [Provider Name], UdqClients.[Party Name] AS [Patient], (CASE WHEN RecordType LIKE 'MEDI%' THEN 'Medical' WHEN RecordType LIKE 'BILL%' THEN 'Billing' WHEN RecordType LIKE 'FILM%' THEN 'Film' WHEN RecordType LIKE 'OTH%' THEN 'Other' ELSE " END) AS [Record Type], (CASE WHEN RecordType LIKE '%STND%' THEN 'Standard' WHEN RecordType LIKE '%RUSH%' THEN 'Rush' ELSE " END)AS [Type of Service], (CASE WHEN Canceled=1 THEN 'Yes' ELSE 'No' END) AS [Cancelled Requests], CAST(CONVERT(Varchar,Medical.[Date Requested],101) AS Datetime) AS [Date Requested], CAST(CONVERT(Varchar,Medical.MedRecordsDa te,101) AS Datetime) AS [Date Records Received], Attorney, [EMSI Fee], [Provider Fee], MediConnect.[User] AS [Requested User Name], RequestID, Udqcases.CaseID FROM MediConnect INNER JOIN Medical ON Medicconnect.DrVisitId= Medical.DrVisitID LEFT JOIN Contacts ON Contacts.ContactsID=Medical.Doctor INNER JOIN UdqCases ON Medical.CaseID=UdqCases.CaseID LEFT JOIN (SELECT SUM(AmountDue) AS [EMSI Fee], ProviderRequestID FROM Expense WHERE Description LIKE 'EMSI FEE-ALL CASES' GROUP BY </pre>

Dashboard Title	Code
	<pre> ProviderRequestID) EMSI ON EMSI.ProviderRequestID=Mediconnect.RequestID LEFT JOIN (SELECT SUM(AmountDue) AS [Provider Fee], ProviderRequestID FROM Expense WHERE Description LIKE 'RECORDS FEE' GROUP BY ProviderRequestID) Provid ON Provid.ProviderRequestID=Mediconnect.RequestID LEFT JOIN udqClients ON Medical.ClientId=UdqClients.ClientID WHERE MediConnect.EMSI=1 ORDER BY UdqCases.[Case Name] </pre>
Medical Costs Totals Report	<pre> SELECT [Case Name], [File #] , [Case Status Name] , [Status], [Sub Status], [Liability], [Party Name], [Total Bill], [Total Amount Paid], [Balance], [Total Amount Waived], [Final Balance Due], udqCases.CaseID FROM udqCases INNER JOIN udqMedicalTotals ON udqCases.CaseID = udqMedicalTotals.CaseID ORDER BY [Case Name], [Party Name] </pre>
Medical Provider Summary Report	<pre> SELECT [Case Name], [Master Client], CASE WHEN IsDefendant = 1 THEN [Adverse Parties].PartyName ELSE Clients.PartyName END AS [Party Name], DR.CompanyName AS [Provider], CAST(CONVERT(varchar, Medical.[Date], 101) AS datetime) AS [Treatment Start Date], CAST(CONVERT(varchar, Medical.EndDate, 101) AS datetime) AS [Treatment End Date], [Paid By] = STUFF((SELECT N'; ' + P.SaveAs FROM MedPayments INNER JOIN Contacts P ON P.ContactId = MedPayments.Payer </pre>

Dashboard Title	Code
	<pre> WHERE DrVisitID = Medical.DrVisitID FOR XML PATH(""), TYPE).value(N'.[1]', N'nvarchar(max)'), 1, 2, N''), CAST([Bill] AS money) AS [Billed], CAST([Amount Paid] as money) AS [Amount Paid], CAST(ISNULL([Bill], 0) - ISNULL([Amount Paid], 0) AS money) AS [Balance], CAST([AmountWaived] AS money) AS [Amount Waived], CAST(ISNULL([Bill], 0) - ISNULL([Amount Paid], 0) - ISNULL([AmountWaived], 0) AS money) AS [Final Balance Due], udqCases.Caseld FROM udqCases INNER JOIN Medical ON Medical.Caseld = udqCases.Caseld LEFT JOIN Contacts DR ON DR.ContactId = Medical.Doctor LEFT JOIN Clients ON Clients.ClientID = Medical.ClientId AND Medical.IsDefendant = 0 LEFT JOIN [Adverse Parties] ON [Adverse Parties].ClientID = Medical.ClientId AND Medical.IsDefendant = 1 ORDER BY [Case Name]</pre>
Medical Requests Outstanding	<pre> SELECT udqCases.[Case Name], PartyName as [Client Name], [File #], [Master Client], (SELECT SaveAs FROM Contacts WHERE ContactId = Doctor) AS [Medical Provider], CAST(CONVERT(varchar, Medical.[Date], 101) AS datetime) AS [Treatment StartDate] , CAST(CONVERT(varchar, Medical.[Date], 101) AS datetime) AS [Treatment EndDate] , CAST(Bill AS Money) AS Bill, CAST(CONVERT(varchar, Medical.[Date Requested], 101) AS datetime) AS [Date Requested], DATEDIFF(Day,Medical.[Date Requested],GETDATE()) [Days since Requested], CAST(CONVERT(varchar, Medical.DateRecvd, 101) AS datetime) AS [Date Received], CAST(CONVERT(varchar, Medical.FollowUpDate, 101) AS datetime) AS [Follow Up Date], DC.DocCategory AS Category, udqCases.Caseld</pre>

Dashboard Title	Code
	<pre> FROM udqCases INNER JOIN Clients ON udqCases.CaseId = Clients.CaseId INNER JOIN Medical ON Clients.ClientID = Medical.ClientId LEFT JOIN DocCategories DC ON Dc.CategoryId=Medical.CategoryID AND CategoryTab='Medical' WHERE [Received Medical Records]=0 AND [Requested Medical Records]=1 ORDER BY [CaseName]</pre>
Negotiations Tracker – All Cases	<pre> SELECT [Case Name], [File #], [Master Client], [Demand or Offer], CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Date], DemandAmount, ReceivingPartyName AS [Demanding PartyName], OfferAmount, OfferingPartyName, [Talked To], Notes, SettlementAuthority, AuthorizedBy, AuthorizationDate, AuthorizationAmount, [Total Medical Bill], [Total Amount of Lien], [Total Cost], [Type of Fee], Fee, Referral, [Referral Fee or %], UdqCases.CaseID FROM UdqCases INNER JOIN [Demand SubTable] ON UdqCases.CaseID=[Demand SubTable].CaseID LEFT JOIN udqCostTotals ON UdqCases.CaseID=udqCostTotals.CaseID LEFT JOIN udqLienTotals ON UdqCases.CaseID=udqLienTotals.CaseID LEFT JOIN (SELECT CaseID,SUM([Total Bill]) AS [Total Medical Bill])</pre>

Dashboard Title	Code
	<pre>FROM udqMedicalTotals GROUP BY CaseID) Med ON Med.CaseID=UdqCases.CaseID</pre>
Negotiations Tracker – By Current Case	<pre>SELECT [Case Name], [File #], [Master Client], [Demand or Offer], CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Date], DemandAmount, ReceivingPartyName AS [Demanding PartyName], OfferAmount, OfferingPartyName, [Talked To], Notes, SettlementAuthority, AuthorizedBy, AuthorizationDate, AuthorizationAmount, [Total Medical Bill], [Total Amount of Lien], [Total Cost], [Type of Fee], Fee, Referral, [Referral Fee or %], UdqCases.CaseID FROM UdqCases INNER JOIN [Demand SubTable] ON UdqCases.CaseID=[Demand SubTable].CaseID LEFT JOIN udqCostTotals ON UdqCases.CaseID=udqCostTotals.CaseID LEFT JOIN udqLienTotals ON UdqCases.CaseID=udqLienTotals.CaseID LEFT JOIN (SELECT CaseID,SUM([Total Bill]) AS [Total Medical Bill] FROM udqMedicalTotals GROUP BY CaseID) Med ON Med.CaseID=UdqCases.CaseID WHERE UdqCases.CaseID=Dbo.fn_GetCurrentCaseID()</pre>
Other Parties Information	<pre>SELECT * FROM udqOtherParties ORDER BY [Case Name], [Party Name]</pre>
Referrals	<pre>SELECT Udqcases.[Case Name], [File #], [Master Client],</pre>

Dashboard Title	Code
	Liability, [Case Status Name], [Status], [Type of Fee], Fee, Referral, [Referral 2], [Referral 3], [Referral Fee], [Referral Fee or %], [Secondary Referral Source], udqCases.CaseId FROM UdqCases ORDER BY [Case Name]
Service and Initial Pleadings	SELECT Udqcases.[Case Name], udqClients.[Party Name] Client, [Event Date (DOA)] DOA, udqOtherParties.[Party Name], [Service Date], [Service Deadline], [Answer Filed], [Date Complaint Filed], SOL.SOLType, CAST(CONVERT(varchar,SOL.SOLDate,101) As datetime) AS SOLDate, CAST(CONVERT(varchar,SOL.CompliedDate,101) As datetime) AS CompliedDate, udqCases.CaseId FROM UdqCases LEFT JOIN udqClients ON udqCases.CaseId=udqClients.CaseId AND ClientID=dbo.fn_GetFirstClientID(udqCases.CaseId) AND udqClients.[Party Name] <>'Party' LEFT JOIN udqOtherParties ON udqCases.CaseId=udqOtherParties.CaseID AND udqOtherParties.[Party Name] <>'Party' LEFT JOIN SOL ON Sol.CaseId=udqCases.CaseID AND SOL.ClientId=udqClients.ClientID ORDER BY [Case Name]
SOL (Statute of Limitations) Report	SELECT udqCasesAll.[Case Name], [File #], [Party Name], [Date of Filing],

Dashboard Title	Code
	<pre> CAST(CONVERT(varchar, SOL.DOA, 101) AS datetime) AS [DOA], CAST(CONVERT(varchar, SOL.SOLDate, 101) AS datetime) AS [SOL], Payee AS [Master Client], CASE WHEN SOL.Complied=1 THEN 'Yes' ELSE 'No' END AS [Complied], CompliedDate, udqCasesAll.Caseld FROM udqCasesAll LEFT JOIN udqClients ON udqClients.Caseld = udqCasesAll.Caseld INNER JOIN SOL ON SOL.Caseld = udqClients.Caseld AND SOL.ClientId = udqClients.ClientID WHERE [Case Status] = 2 ORDER BY udqCasesAll.[Case Name] </pre>
Timekeeper Report	<pre> SELECT [Case Name], [File #], CAST(CONVERT(varchar,BillingDateRaw,101) AS Datetime) AS [Date], CONVERT(Varchar(8),Time,108) AS [Time], TimeBilled.PClawUserID AS Author, [Hours] AS [Billable Hours], HoursWorked, HourlyRate, ([HourlyRate]*[Hours]) AS TotalAmount, (Case When TimeBilled.Billed=1 THEN 'Yes' Else 'No' End) AS Billed, BilledDate, (Case When TimeBilled.BillableTime=1 THEN 'Yes' Else 'No' End) AS [BillableTime], TaskCode, [MasterClient], ActivityCode, Explanation, [Priority Code], udqCases.Caseld FROM Udqcases INNER JOIN TimeBilled ON udqCases.Caseld=Timebilled.Caseld </pre>