Version 10.9 Updates

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FEATURES

New Fields, Functionality and Reports

Dashboard

- Subscription Service – Select a report to be delivered automatically to designated recipients
- Email Reports – Ability to Email any Dashboard Report as Word, Excel or PDF
- Mailing Wizard – Document Generation and Mass Mailings across multiple cases or multiple Contact Types

DocuSign

- DocuSign integration included in Intake Cases Manager. DocuSign provides electronic signature capability to all documents created in TrialWorks

Intake Cases Manager

- Import and/or Export an Intake matter using XML language and include the TWService to automate. XML language can be used to transfer web-based intakes to TrialWorks and to send your referral intakes to another TrialWorks Law Firm

Medical Records Retrieval

- Integration with XeBee Records (www.Xebee.com)

Outlook Addin

- Save Outlook Contact directly to a case in TrialWorks using the right-click File to TrialWorks. The Contact is added with the Contact Type of "Other"
- Attach a document from the TrialWorks Casefiles to an Outlook Email
- Save an Outlook Calendar item to the Docket in TrialWorks. Includes initials from Users List and Case Name in the subject of the Calendar item and add the Docket Activity from the Addin.
- TrialWorks compatibility with Microsoft Office 2016

Templates

- Create Email Templates that can also be used with Dashboard Subscriptions and Mailing Options

Workers' Compensation

- New detail forms include expanded questionnaire that includes automating calculations for TTD and PPD and library for specific bodily injury.

Assessment Enforcement

- Provide the ability to calculate "Manual Interest"

IMPROVEMENTS

Additional Bookmarks, Fields and Settings

Address Book

- Adding a contact to a case from the Address Book (Add To Case) will prompt for a Conflicts Report to be generated and saved to the Case
- Adding a new contact to the Address Book using Insert Existing Contact will automatically add the Contact to the case.

Bookmarks (New)

- Bookmark for Caption:
  - Arbitrator
- Bookmark for Contacts
  - CorrCounty
- Bookmarks for Other Parties:
  - OtherPartyNameAll [List of Other Party Names]
  - OtherPartyRoleAll [John Doe Beneficiary]
  - OtherPartyAddressAll [Name and Address Block]
- Bookmarks for Workers' Comp

AWWAGR	CALCULATIONSOURCE
FATAL	MEDICALBILLSPAID
NUMDAYS	NUMWEEKS
PPD	PPDAGR
PPDINS	SSD
TOTALPERMANENTDISABILITY	TTDAGR
TTDCLAIMED	TTDOVER
TTDOWED	TTDPAID
TTDSTATE	UNEMPLOYMENT
WCADDITIONAL	WCAMOUNTREDUCTIONS
WCDISABILITY	WCDOCTOR
WCGRANDTOTAL	WCSUBTOTAL
WCTTDPERIODS	WCAMOUNTREDUCTIONS (Calculated Bookmark)
WCDISABILITY (Calculated Bookmark)	WCDOCTOR (Calculated Bookmark)
WCTTDPERIODS (Calculated Bookmark)	

- Workers Comp > Wages – Multi-Record Bookmarks

AMOUNT	DESCRIPTION
DOCTORAUTHORIZE	EMPLOYMENTID
FULLDUTY	HOURS
LAIDOFF	LIGHTDUTY
OFFAGAIN	RETURNTOWORK
SEC10	SUSPENDED
TERMINATED	WAGE
WAGESENDDATE	WAGESSTARTDATE
WRITTENORAL	

Call Log
- Set Default Setting for Author to automatically populate User

Caption
- New field called Arbitrator that pulls from contacts with a Contact Type of Arbitrator

Case Types
- Mass Tort sub-forms have been moved from Clients and Other Parties and are now listed under Custom Database/Questionnaires. These forms can now be limited to specific liability and sub-liability types. Questionnaire forms include Asbestos, Fraud, Pharmaceutical, Product Liability, Social Security and Tobacco Fund. You can also access these through the Settings > Case Forms icon.

Contacts Type
- New type Arbitrator

Costs Tab
- New additional link
- Convert data in Invoice field for Link2 in Costs

Dashboard
- Save all modified views in My Views

Deposition
- Limit Covering field to pull from Docket "Assigned To"

eLaw
- Modify activities to pull more descriptive names instead of defaulting to eLaw
- Send Plaintiff and Defendant to eLaw when adding case to CaseWatch Pre-RJI

Envelopes
- Select from All addresses for a contact (Mailing Address or one of the More Addresses)

Fast Track
- Assign to All or Assign to Multiple
- Assign a Fast Track based on the Attorney/Support fields on Case Retainer
- Duplicate a Fast Track
- Rename a Fast Track
- Right-click Fix Drop-Down to Fast Track Assigned To

Global Settings
- Option to turn on the Trial Materials tab for all cases
- Path to Template Location to be used with the Save As in TrialWorks option in Word. Path needs to be populated to use this function
- Option to Use Initials For Docket Assigned to that will automatically be populated from Outlook Calendar items
- Option to add initials to beginning or ending of Outlook Calendar Item Subject
- Case Types – Move all Mass Torts (Clients and Other Parties) Questionnaire forms to Case Types > Custom Database and Questionnaire. Questionnaire Forms Include: Asbestos, Association Info, Fraud, Pharmaceutical, Product Liability, Social Security, Tobacco Fund, Vehicle Info, and Worker's Comp. Associate a form to specific case types. Users double-click Questionnaire field to choose from drop-down list.

Intake Cases Manager
- When an intake is pushed to TrialWorks send a refresh case list to all users to update the Case List drop-down. TrialWorks Active case list refreshes automatically.
- Add a prompt to remove Disposition Date if the intake is being pushed to Active TrialWorks
- Add Worker's Comp Questionnaire to Intake > Employment

Medical
- When docketing from the Medical Tab improve the description added in the Docket detail.

MediConnect
- Append additional documents to an original request
- Add additional documents to more links of the original request

New Case Wizard
- Master Client field is added to the General Litigation wizard

Other Atty
- Improve the tab order to correctly move through fields

Other Parties
- Improve the feature to "Copy all Other Parties" to include Parties, Contacts and Other Attorneys

Pleadings

- Improved sort within the Pleadings Description field by limiting the view of the datasheet to 255 characters

Reports

- TrialWorks Today – Print Report available.
- Pick Status added to 30/60/90 Day New Case Report
- Conflicts Report – improve the addition of a Conflicts Report on the Memos (Documents) tab to show the name of the individual (or Company) the Conflict was run.

Security

- Logging for opening (hyperlink click) and Email from the Email tab
- Common label names from Correspondence Detail for To Multiple Parties, Add New Contact, CC Multiple Parties, BCC Multiple Parties, Add Global Contact
- Docket > Choose Assigned To including OK and -/+ buttons
- Workers Comp Questionnaire form to Form Level and Field Level security
- Field Level Security for Notes Topic
- Home, Current Case, Templates, and User Tools Ribbons to Field Level Security

Timekeeper

- Prompt for time for an email as soon as an email is filed into a case

Transaction Log

- Opening (hyperlink click) an email from the Email Tab

TrialWorks

- Ability to save a custom view for Dashboard view selection, Outlook Addin Options, Reminders, Timekeeper Manager and TrialWorks Today.

TrialWorks Office Addin

- Appeals and Trial Materials as options to Save documents in TrialWorks

User Defined Forms

- For date fields, add the ability to right-click and Send to Docket to create an Add to Tickler.

ERROR

Fixes to Bugs and Error Messages

Address Book

- Error when opening the Address Book by clicking on Insert Existing Contact and editing a contact was automatically added to the current case.

Bookmarks

- Error where bookmarks on Medical Tab did not generate [AmountBilled, AmountPaid and DOR]
- Error where the wrong date was being populated in AssessmentBalanceBreakdownGrouped bookmark. Date was pulling in a future date.

Case Review

- Error where Redemption prompt appeared when sending a task to Outlook

Client

- Error where the modification of an email address caused #mailto to appear in the hyperlink
- Limit the Date of Accident to contain a date only (exclude time)

Contacts

- Enable a link to be added to the Contacts >Expert tab for the Transcript and Breakdown fields
- Contact Save As logic was updated to include with the global setting set to "Last, First Middle" or "First Middle Last", a contact with no first/last name should have a save as populated with the company name instead of leaving it blank. With the global setting set to "Company", a contact with no company name should have a save as populated with Last, First Middle instead of leaving it blank.

Contacts Search

- Error when searching for a work phone number caused "no results"

Deposition

- Allow user to choose Party Name in drop-down

Docket

- Error when creating a docket entry with recurring reminders caused a runtime error because you deleted the first row in the recurring reminder window

E-Mail

- When sending an email from TrialWorks to another Internal user the email would appear in the user's Inbox with "this email will be filed when closed" in the Outlook Add-in. This caused the email to be automatically filed when the user closed the email.

- Filing a Microsoft Undeliverable Email caused the language to appear in Chinese.
- When attempting to file an email that had been created over a long period of time caused filing error
- POP3 email accounts were unable to send Invitations created from Docket > Add Tickler window

Fast Track
- Error that caused Fast Track entries sent to the Outlook calendar would be created with "today's date instead of the actual docket date
- Error where Fast Track entries within a single Fast Track with a duplicated description would not be added to the Docket.

FileIT
- Error that was caused when changing the case filters while your cursor was in the Case name prevented the list from updating
- Error that populated the email list in FileIT with the Invitees from Case Retainer. This field should be used to add additional email addresses to send a copy of the transferred document. The Invitees will be automatically added when the email is created.
- Error that caused a blank sub-folder to be created in Damages when using the Global Setting to turn on Category Subfolders. Damages does not support categories

Global Settings
- Add/Remove Tabs – error when applying tab profile to Liability Specific settings
- Error when using Incremental File # and adding text to the number caused a break in the incremental advancement

Intake Wizard
- Error when leaving the Contacted By contact blank but creating an Injured Party would create a blank contact when pushed to TrialWorks
- Error when pushing an Other Party from the Intake Wizard would be saved with Company Name only. When there is a first/last name present. If there is a first/last name, the party name should be the first/last name. If there is no first/last name, the party name should be the company name.
- Error when pushing an intake to TrialWorks would not populate the File # when the global setting was set to (yy-mm-xxx-Liability)
- Error when pushing an intake to TrialWorks where the Referral Contact save as was longer than 50 characters
- Present error when pushing an intake to TrialWorks when the Case Status was blank
- Only allow users to choose a document category from the library based on the Tab chosen to save your document
- Allow a document to be saved on the Medicals Tab by choosing the Party (required)

- Error in Intake Wizard > Client > Incident when completing the Date and Location and Statute fields and then clicking on the Notes caused the Date and Location to be deleted

Medicals
- Error when transferring documents with FileIT did not update the QTY field

Reports
- Contacts Report – error that resulted in "There are no records that match this criteria".
- Global Calendar Report – error when generating the report for a single docket category to generate correctly from the pick window
- Medical Summary Report – error where Summary information was not shown correctly
- Medical Report Summary by Date – Amount Waived shown in report
- Medical – By Provider and Medical – By Provider – Payment Breakdown – remove unnecessary Sum textboxes
- Time & Expense Report – error when generating the report and saving to Memos caused the document not to be saved when the Memos Casefiles folder didn't exist

Timekeeper
- When you have the Global Setting to auto start timer and generate a template that has 0 in the time field it doesn't auto start the clock on the timekeeping entry
- When the call log is transferred to the timekeeper the Details are not transferring to the Explanation field.
- Timekeeper Timer – add logic to stop the automatic timer when viewing a timekeeper entry marked Billed.

Transaction Log
- Error caused the Intake Transaction Log to fail to open when the log was too large