

## **Suggested Document and Notes Categories**

All areas of TrialWorks can be setup with Document Categories. These categories make it easier to filter out information that might be difficult to see because of the amount of data contained on the Tab. Document categories are found on the Correspondence, Pleadings, Legal/Discovery, Depositions, Hearings/Motions, Subpoena, Medicals, Ancillary, Emails, and Notes. Consistency is important across all areas of TrialWorks but especially with Categories

Accident Accidents-Prior Additional Info Needed Adjuster

Annuity
Answer
Appearance
Appointment
Arbitration
Authorization
Background Check

Bills

Calendar Call
Case Closed
Case Meeting
Case Notes
Case Turndown
Cause of Action

Check Claims

Client Appointment Client Documents Client Follow-up

Client Information

Client Meeting
Client Related
Client Update
Conference Call
Conflicts Check

Costs

Counter-Offer Lawex Corporation © 2013 Court
Court Filing
Court Reporter
Coverage
Demand

Deposition
Directions
Disability
Disbursement
Discovery
Distribution
District Attorney

Docket

Documents
Economic Damages
Employment

Estate
Estate
Evaluation
Evidence
Exhibits
Expert

Expert Testimony

Facts

Fee Reduction
Filing
Follow-Up
Hearing
HIPPA
IME

**Injuries** 

Inspection
Insurance
Intake
Investigation
Issues
Jurisdiction

Jury Instructions
Liability
Lien
Mediation
Medical
Medical Bills
Medical Providers
Medical Records
Medical Symptoms

Meeting

**Monthly Contact** 

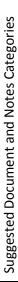
Offer

Offer Accepted Phone Call

Phone Call - Monthly Police Report

Policy Information Policy Limits Pre-Trial Prior Attorney Process Server Property Damage

Receipt Referral Reject





Release Settlement Summary Judgment
Report Settlement Authority Tax Documents
Representation SOL Transcript

Research Statement Travel Arrangements
Review Status Trial

Scheduling Conference Strategy Wage Loss
Service of Process Structured Settlement Witness

If your firm would like to import this list into your Document Categories list, please contact our TechSupport department.