Contact Management

Version 11 and higher

Overview of Contact Records in TrialWorks.

Address Book

Managing your contacts is a key component to utilizing TrialWorks the most effective way possible. Verifying that the contact you want already appears in the global Address Book will link that contact to a new case.



You can search your Address Book by Contact Yype. You can also look for a contact by selecting Clear at Contact Type, "Show All" and searching alphabetically. From your Address Book, you have the ability to:

- Add or Delete a new Contact Record to TrialWorks
- Edit an existing Contact Record in TrialWorks
- Add a selected Contact to a case in TrialWorks

- 500 For Maria	1	1.000	1	SHOW AIL ACTO	ise renty	I State of the	19952	1.2.2.2	1.5	1 3851055	1
Save As	Туре ~	First Na	Last Na	Company Name	Email Addr	Work	Cell	Address	City	State	Zip Code
	Adverse Party			INSURANCE COM				5678 So	Happyville	FL	54321
ABC Moving, Inc.	Adverse Party	Driver	Truck	ABC Moving, Inc.	abcmoving	(305) 55	(346) 57	ABC Mov	Miami	FL	33176
Anderson, Aaron	Adverse Party	Aaron	Anderson		and the second	(954) 55		4344 Firs	Miami	FL	31555
Bunny, Bugs	Adverse Party	Bugs	Bunny					225 US H	North Palm	FL	33408
First National Bank of Washington	Adverse Party			First National Ban				100 S. Se	Raleigh	NC	02023
Parker, Peter	Adverse Party	Peter	Parker		peterparker	(346) 21	(263) 57	5662 Spi	Metropolis	NY	45354
Social Security Adminstration	Adverse Party			Social Security Ad				8888 Stre	Miami	FL	33147
Some Drug Company	Adverse Party			Some Drug Comp		(800) 55		8585 Dru	Miami	FL	33146
Lawyer, Joe B.	Attorney	Joe	Lawyer	Law Offices of Joe	oppcouns@	(313) 55	(313) 56	765 Auto	Riley	MI	48041
Runner, Road	Client	Road	Runner	Road Runner & As	roadrunner	(333) 33	(111) 11	1234 So	Coral Gables	FL	33146
Snow, MD, John D.	Expert Witness	John	Snow, MD	Medical Company	drsnow@so	(888) 11	(888) 56	1234 Doc	Miami	FL	33176
Record: 1 Of 11											



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Additional Options

You can also perform nine (9) additional functions directly from the CONTACTS TAB button bar:



- 1. Add a Contact (Green Plus Sign) to enter a contact not already found in TrialWorks.
- 2. **Insert Existing Contact** to choose from your global Address Book. This option allows you to link an existing contact into your current case. Linking an existing contact will allow you to update a phone number or street address to any case and have it update the contact in all cases.
- 3. **Contact Reports** Case Report; Witness Report; Case Report Limited by Contact; Case Report Grouped By; Expert Report; and Expert Information.

Contact	s Index Screen	
Contacts Report Optic	ons	
Case Report	Case Report Grouped By	
Witness Report	Expert Report	
Case Report Limited By Contact	Expert Information	
		-5]

4. Envelope - Print an envelope directly from CONTACT TAB.

Corel Goole: FL 33146	Barry Allen, Ph.D. Central City Police Department 11551 Any St Miami, FL 33143	



5. **Duplicate Entry** - When you have contact information that is the same for multiple people (e.g., Husband, Wife and Child living at same address,) instead of re-typing the fields, simply use the "Duplicate Entry" feature, which will copy the common data from the first record and allow you to create a new record entry for the next person.

	S 2 101000			Contact Det	ail	1995) - C. (1899)		_ D X
		_		Contact Det	.ali		E	
Allen, B	arry (Dup	olicate)	2					
Contact Additi	ional Cases C	ommunications H	istory					
Role						Contact		
Type:	Team Manage	r 🔻				Work:	(325) 111-1111	
Sub Type:						Cell:	(315) 444-4444	
	Employee	Expert	Deposed	🗌 Interviewed	Witness	Home:	(315) 222-2222	
Name						Fax:	(315) 333-3333	
First:	Barry		Prefix/Suffix:		Ph.D. 👻	Direct Dial:	(800) 357-5844	
Middle:			Maiden:			Toll Free:	(800) 377-5844	
Last:	Allen		Salutation:	Mr. Allen		Email:	barry@justicesociet	<u>ty.com</u>
Company:	Central City Po	lice Department				Alternate Email:		
Save As:	Allen, Barry (Du	uplicate)			•	Website:		
Address		9	Personal			Other		
Address:	124 Any St		Gender:		•	Title:	Justice Society of A	merica
	2		SSN:	###-##-5781		Specialty:		
City:	Central City		DOB/DOD:	3/5/1986	6/3/2032	Related:		0
State/Zip:	NY	10666	Language:		•	Account #:		
County:						Party:		
Notes			Case Notes			Relationship To	Case	
Notes		^	Notes		^			<u>^</u>



6. **Email Contact** - Automatically generate an Outlook email that will be linked to the case.

85	0 h		Regard	ding: AAA MICH	AEL PHELF	PS V. USA (f/	k/a SHAQ) (F	ile #: 6144	I)	1	五 -	- 0	×
File	Message	Insert	Options	Format Text	Review	Help	DutlookSpy	TRIALV	ORKS	Design	Layo	ut 🔉 Te	ll me
Paste	Calibri B I	+ 11 ⊻ 2	• A •	: E • }E • ■ = = •		ddress Chec Book Name	 Attac Attac Attac Attac Signa 	ch File ▼ ch Item ▼ ature ▼	Assign Policy *	▶ - ! ↓	Office Add-ins	Dynamics 365	
		-BAZ- La	basic lext		La	Names	inci	uae	Tags	19	Add-Ins		^
Will be filed	when sen	alworks	CHAFL PH	FLPS V USA (f/k	(a SHAQ) #	6144							*
Case Name:									Category:	-			-
	File	to TrialW	iorks 🛛	Attach Docun	nents								
	То	barry@j	usticesociet	ty.com									
	Сс	1											1
Send	Bcc	1											
L	ubiect	Regardi	ing: AAA M	CHAEL PHELPS \	USA (f/k	a SHAO) (Eile	#: 6144)						-
													_
	TRI/	LWO	RKS 508										
Coral Gab P: 1.305.3 F: 305.357	oles, FL 33 157.6500 (7.6499	3146 (ext. 440)											

7. All Contacts to Outlook - Send all of the Contacts from the Case to your Outlook Contacts.

📑 Sent Items	~	ОК
Deleted Items (1014) Archive (95)		Cance
Calendar Contacts		New
Conversation History		
Notes	=	
RSS Feeds		
Scheduled Tasks		
TrialWorks		





8. Print - Print all data fields for a Contact record to paper. Or, you can email the contact record or convert it to a PDF, Word or Excel file!

Type of Contact	:	Company	Name Cent	ral City Po	lice Depar	tment	Image
Client Hospital		Salu	tation: Mr. /	Allen			
Insurance		First Las	t Name Barr	/		Allen	
Judge Videographer		Billing Ad	Idress: 124	Any St		[<u>[</u>	
Party Barry	A Allen] City stat	e zin: Cent	ral City		V 1 10	666
Contact Title:	Justice S	ociety of Ame	rica	Email A	ddress	barry@	justicesociety.com
Work Number	(325) 11	1-1111		- Extensi	ion/Othe		in a state of the
ar Phone: (315) 444-4444				hone:	(315) 2	22-2222	
Fax Number:	(315) 33	3- <mark>333</mark> 3		Notes		Notes	
Pager:	(315) 55	5-5555		Allen E	Barry		
Relation to							
cuser				Sa	ave To Al	Cases	
Previous Corres	spondenc	e with Cont	act		Author		Description
10/27/2017	To	Tod Cardoso	Insurance Af	fidawit	Patrice Gir	200007	Josuranco Affidavit
07/31/2017	To	Tod Cardoso	anoundrice Ai	IN CALL	Andres Dia	17	Theorem of the standayle
07/31/2017	То	Tod Cardoso	Maintenance	Expiring NE	Patrice Gir	nenez	Maintenance Expiring NEW 201

9. Delete - Delete a Contact record from the case *without deleting* the Contact record from the database by clicking the Red X button.



CONTACT DETAIL RECORD

			Contact Deta	il			- 0
Allen, B	arry						
Contact Additi	ional Cases Communicatio	ns History					
Role					Contact		
Type:	Videographer	•			Work:	(325) 111-1111	
Sub Type:		•			Cell:	(315) 444-4444	
	🗌 Employee 🛛 🗹 Expert	Deposed	Interviewed	Witness	Home:	(315) 222-2222	
Name					Fax:	(315) 333-3333	
First:	Barry	Prefix/Suffix:		Ph.D. 🔻	Direct Dial:	(800) 357-5844	
Middle:		Maiden:			Toll Free:	(800) 377-5844	560
Last:	Allen	Salutation:	Mr. Allen		Email:	barry@justicesociet	y.com
Company:	Central City Police Departm	ent			Alternate Email:	barry.allen@ccpd.g	ov
Save As:	Allen, Barry			•	Website:		
Address		Q Personal			Other		
Address:	124 Any St	Gender:	Gender: Male 👻			Justice Society of A	merica
		SSN:	###-##-5781		Specialty:		
City:	Central City	DOB/DOD:	3/5/1986	6/3/2032	Related:		
State/Zip:	NY 10666	Language:	Italian	•	Account #:		
County:	Westchester				Party:		
Notes		Case Notes			Relationship To (Case	
Notes		~		~			
Add To Out	ook Call Log Copy	To Clipboard 🔻					5

Details of every Contact appear in a Contact Detail Record:

NOTE: There are certain fields that are case-specific; those fields are highlighted in grey. These fields change depending on which case you're viewing the contact record from. This means if your contact is found in three different cases, those grey fields will update to their contact information relevant to the case you're in.



In addition to the primary Contact Record information, there are four (4) additional tabs:

1. Additional - Contains multiple phone numbers, addresses and expert documents.

				Contact Detail					3
Allen. Ba	arrv								
Contact Additic	nal Cases Comm	unications History	1						
	cases Comm			2.02					
Phone Numb	bers	-	Address	es				1	-
Description	 Phone Number 	Extension	Label 🔺	Address	City	State	Zip	Include In Service List	-
			Home	123 Any Street	Coral Gables	FL	33146		
			Other	11551 Any St	Miami	FL	33143		
			0						
Expert Docur	ments				5/768		1		
Date	Link				[ype		Notes		-
					ireakdown		TESTIMO	NY TYPE: Plaintiff Exper	
					Jury Verdict Report			ONV TYPE: Plaintiff Expo	
	New Text Docume	nt (2).txt		۲ ۲	ranscript		TESTIMO	NY TYPE: Plaintiff Exper	
2/8/2016	New Text Docume	<u>nt (2).txt</u> ord Document.docx		T	ranscript Curriculum Vitae		TESTIMO	NY TYPE: Plaintiff Exper	

2. Cases - This sub-tab displays every case that the Contact record is linked to as a contact. Note that the Contact may participate in other cases in different Types of Contacts.

				Contact Detail			
Allen, Barr	у						
Contact Additional	Cases	Communications	History				
Cases where contac	t appears	s in:				(Filter By Case St	atus)
Case Name				*	File #	Type Of Contact	Case Status
AAA MICHAEL PHE	AAA MICHAEL PHELPS V. USA (f/k/a SHAQ)				6144	Videographer	Substitute
Monroe, Mickey					10607	Client, Hospital, Insuran	Referred Out
Wells, Harrison					10808	Team Manager	Settled
Wells, Harrison G.	Wells, Harrison G.				11194	Client, Hospital, Insuran	Settled
Wright Vickie M. C	right Vickie M. (Testing Case)				11130	Police Precinct	Substitute



3. Communications - Displays every communication this Contact has had in all cases.

				Contact Detail					x
Allen, Ba	arry								
Contact Additio	nal Cases Commu	nications History							
All communicati	ions, emails, and call lo	og entries for this co	intact:		(Filter By Tab)	•	(Filter By Case	Status)	ł
Date -	Description	Link	Link2	Tab	Author	Case Name		Case Status	1
10/27/2017	To: Allen, Barry. Ins	Insurance Affida		Correspond	Patrice Gimenez	AAA MICHAEL PHELPS V. U		Substitute	-
10/10/2017	To: 'barry@justices	EMAIL		E-Mail	Robb Steinberg	AAA MICHAEL	PHELPS V. U	Substitute	
9/25/2017	To: Allen, Barry. 1s	1st Cint Ltr		Correspond	Seth Gram	Wells, Harrison		Settled	
8/9/2017	To: Allen, Barry. At	Attorneys		Correspond	Vickie Wright	Wright, Vickie I	M. (Testing C	Substitute	-
8/9/2017	To: Allen Barry			Deposition	Diane Danois		PHELPS V LL	Substitute	

4. History - Displays all historical transactions of changes to this Contact Record.

			Contact Detail						×
Allen, B	arry								
ontact Additi	onal Cases Communic	ations History							
Historical trans	sactions for this contact:								
Changed By	Date	Туре	Company	First Name	Last Name	Address	City	^	
sgram	9/19/2017 11:57:23 AM	Videographer	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central C	it
sgram	7/18/2017 12:57:44 PM	Client	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central C	ity
sgram	7/18/2017 12:57:12 PM	Team Manager	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central C	ity
sgram	6/1/2017 3:37:54 PM	Team Manager	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central C	ity

Finally, the Button Bar at the bottom of the Contact Detail display three additional features, allowing you to add the Contact Record to Outlook, create a Call Log entry, and Copy to Clipboard.





CONTACT TYPES: Global and Case Specific

Contact Types are used to categorize contact records in TrialWorks, because a person can have different roles in different cases. Different contact types trigger different functions within TrialWorks.

- Insurance allows for that contact to be used on the Insurance/Liens tab;
- Healthcare providers (indicated in the Contacts Type library as Meds) allows any contact to be used on the Medical tab.
- When a new contact record is created, the Contact Type selected becomes the *global type* for that record.

The **global** type means that this is the contact's main identification. "Who is this person?" In the picture below, we see the checkbox checked for client because Barry Allen is the firm's client. This is Mr. Allen's *global type*.

•			Contact Detail		_ 0 X		
Allen. B	arrv						
Contact Additi	ional Cases Communications Hi	story					
Role				Contact			
Type:	Client, Hospital, Insurance, Juc 🔻			Work:	(325) 111-1111		
Sub Type:	Type of Contact	+ Global		Cell:	(315) 444-4444		
	*		☐ Interviewed ☐ Witness	Home:	(315) 222-2222		
Name	Team Manager			Fax:	(315) 333-3333		
First:	Hospital		▼ Ph.D. ▼	Direct Dial:	(800) 357-5844		
Middle:	Client	✓		Toll Free:	(800) 377-5844 560		
Last:	Insurance		Mr. Allen	Email:	barry@justicesociety.com		
Company:				Alternate Email:	barry.allen@ccpd.gov		
Save As:	Allen, Barry		•	Website:			
Address	0	Personal		Other			
Address:	124 Any St	Gender:	Male	Title:	Justice Society of America		
		SSN:	###-##-5781	Specialty:			
City:	Central City	DOB/DOD:	3/5/1986 6/3/2032	Related:			
State/Zip:	NY 10666	Language:	Italian 👻	Account #:			
County:	Westchester			Party:			
Notes		Case Notes		Relationship To (Case		
Notes	<u>^</u>		<u>^</u>		^		
	~		~		~		
Add To Outlook Call Log Copy To Clipboard -							



Generally speaking, most contacts have just one *global* contact type. However, because a contact may have multiple roles in a case, TrialWorks also provides for the ability to distinguish between a *global* and *case specific type* for each Contact Record.

You can modify a Contact Type to reflect one or multiple roles in a particular case by selecting from the dropdown and adding the new Contact Type(s) to the Contact Detail. *For this new, case specific type, however, you would NOT check the global box setting*. Notice in the image above that opening a Contact Record within a case shows fields shaded gray in the Contact Detail window. Shaded fields show case specific details including the new case Contact Types.

What Information Will The Contacts Tab List Reflect?

The Case Specific Contact Types for each Contact Record will show in two ways:

- 1. The first contact type entered shows in the list.
- 2. Below, in the contacts preview, the lower righthand corner reveals *all* of the contact types that contact has for *this particular case only*.



Notice the subtle distinctions between the Contact Detail from the Address Book (above) versus the Contact Detail from the Case Specific entry (below):



ste Info Clients	Contacts Contracted and Costs	Deposition Discourse Docket	Bral Hearings Hirdr	ny Insurance/1 i	and participation	Medical M	erso Micrellarecu	n Notes Other	Parties Photos	Pleadings Documan	t Research Feview Summar	Trial Mate	rial Experts			
secific Contact Type:		Show Experts	Only					-	- 12							
ype of Contact arty orter	Party Driver of the Truck Tell All	ABC Moving, Inc. ABC Moving, Inc.	E-mail atcinicing@email.com donthelit@none.com	Snow, N	vID, John	۱D.		Contact Det	1		- 0 X	by <i>ers</i>	Deposed	Expert	Direct Dial	Enternion +
arty st5 Jess Gray box colorid D	Holiaith's sourt Drives of the Truck Defendent Mony Jane Lonney Denred M. Muldistrock Roger Rabbit all smith Bill smith Robot and Case Specific, and denot Server shith bill his rate.	Dangeroux, Rodiny R. Diang, Wabe E. Lavyer, Jole B. Loosy, Mory, Jane Middleforoc, Donald M. Rabitt, Roger smith, Bill Show, MD, John D.	rodney@dongerouxdorto ndisrey@trate.com approxim&net.com.org mjicarey@arnat.com dmittikte.com mittikte.com hiligacent.com hiligacent.com cetthowfb.comeentat.com	Contact Addit Role Type Type Name First Niddle: Last	enal Cases C Expert Wilness http://www. http://www. Snow, MD	ommunications a. Treating Physical III isspent	History Upposed Prefix/Suffix Maidee Salutations	Interviewed Dr. Snow	- Witness	Contact Work: Cell Home: Faic Direct Disk Toll Pres: Fmail	2889 111-2222 2889 554-5744 2889 554-5744 2889 454-555 2999 444-555 2000 (2000) 2000 1000					
Theory of	, anow page in this case.			Company: Save Att Address Address Coy. State/Zo:	Medica Comp Snow, MD, Joh 1234 Coctor Main FL	hary vame	Personal Censer: SSNI BGG(DDD: Larguege	Male		Adenate Entral: Website: Other Trife: Specialty Related: Account #:	Orthopedic •					
90-ef 18] > H >	3 No Filter Founds			County: Notes	ook Catuo	g Copy To C	Case Notes Dr. Snow fr arre of the seport With	rst treated the p a accident. He later ress for the case,	riff at the tecame like	Perty: Relationship To C Dr. Snow is both Witness in this ca	John Snow, M.D. Case a Treating Physician and Expert		La Ca			
ormation				Ph	one Numbers		internet/Persone	Bł						Type/Notes		

Helpful Hints

1. When identifying a Contact's Global identification, there should be only one. Remember, a doctor, is a doctor, is a doctor. Whether the doctor is a treating physician, an expert witness, or an adverse party, the *global* contact type is still <u>doctor</u>.

Think of it this way:

GLOBAL TYPE

CASE-SPECIFIC TYPE

Doctor

Treating Doctor Expert Doctor

- 2. If you never make a change to a contact's Contact Type, you will always see the global type.
- 3. Once you designate a case specific type to a contact record, the global type disappears and you'll only view the case specific type. Remember, this is the critical role for that case.



SEARCHING FOR A CONTACT

You can conduct a simple search for a contact by clicking on the Contact Search button on your Home RIbbon:



This will generate the following detail window, where you can enter information into any of the fields to search for your contact. Enter as much or as little that you need.

		Find Contact	×
Type Of Contact: Accounting/Bookkeeper Adjuster Adjuster1 Adverse Party Alumni - 09 Ambulance	Company Name: Salutation: First, Middle, Las Address:	t:	
	City, State, Zip: County:		-10
Contact Title:		Email Address: Extension/Other: Home Phone: AcctNo:	
Search <u>C</u> ance	Ê.		



QUICK CONTACT INFO: When working in a case, use the Current Case toolbar on the Ribbon to easily access all the contacts in the case without having to be on the Contacts tab. The dropdown arrow will show you all of the contacts for that particular case.

Current Case	Templates Reports	User Tools	Settings Adm	iin Tools	Help			
139						6	E	Allen, Barry 🔹
Create	Settlement Settlement Finance Calculator Info Fundi	And FileLabels ng	CaseFiles E-mail Folder	Case Report	Case Status Report	Case Snapshot	Closing Statements *	🎆 (325) 111-1111 🏤 (315) 222-2222 🧵 (315) 444-4444 👻 @ barry@justicesociety.com
iplate Packages	Current Case							Quick Contact Info

If you're interested in learning more about Contact Management within TrialWorks, please contact Training at (305) 357-6500.

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