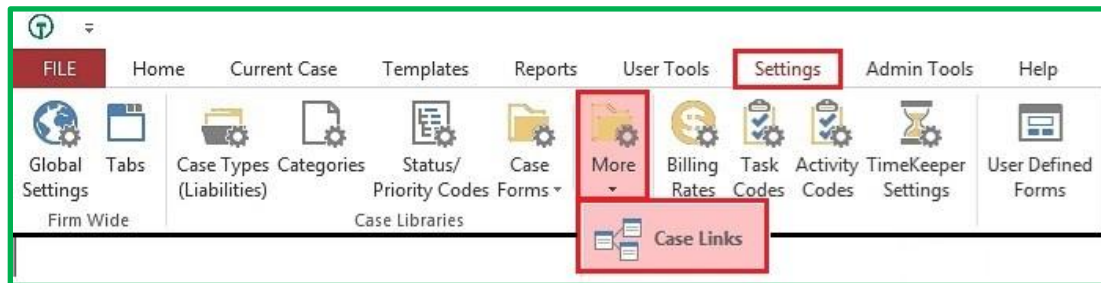


# Managing Mass Tort Cases in TrialWorks

Version 11 and higher

*Mass Tort cases are simple to manage with the use of Case Links and Web-Based Client Intake and User Defined Forms, which provide for a high-level of customization and utility within the Firm's framework.*

## Case Links

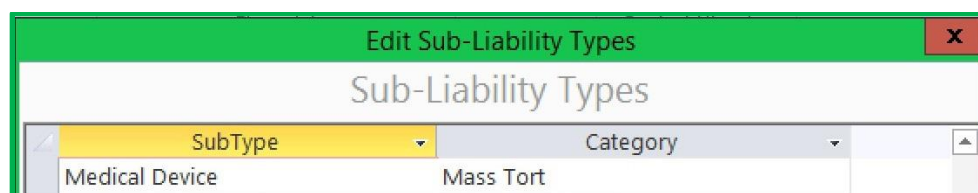


Case Links enable users to *link cases* together for purposes of management and reporting. Linking a Child Case to a Master Case is commonly used in situations where a single matter has multiple claimants. Case Links are also useful in managing Mass Tort cases, where the Master Case is the name of the Product/Drug at issue, and the Child Cases are the actual claimants.

In creating these relationships, Firms can manage hundreds or thousands of cases with similar facts both on an individual level and as a group, by sharing documents that are common to all cases, while still maintaining individuals documents specific to a particular case. All data and documents stored in a Child Case will automatically be copied to the Master Case, thereby eliminating the need to file the same document or enter duplicative data in both cases.

## Let's Get Started

Go to Settings > Case Types (Liabilities) to link a Sub-Liability Type to a Mass Tort Category. For example:



## TrialWorks LLC

Tel 305.357.6500  
Fax 305.357.6499

1550 Madruga Ave, Ste 508  
Coral Gables, FL 33146

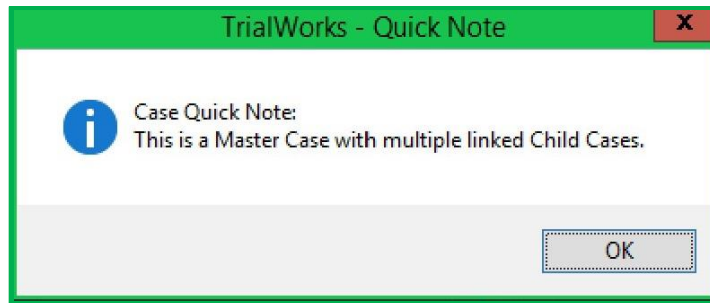
<http://www.trialworks.com>  
[training@trialworks.com](mailto:training@trialworks.com)



Using the New Case Wizard, create a new Master Mass Tort case. For example, “Bad Medical Device Master Case.”

|                            |                                  |
|----------------------------|----------------------------------|
| Case Name:                 | BAD MEDICAL DEVICE MASTER CASE   |
| Master Client:             | <input type="text"/> [v] [...]   |
| Liability / Sub-Liability: | Mass Tort [v] Medical Device [v] |

Once created, from the Case Info Tab, Create a Quick Note from the Extra Info Button:



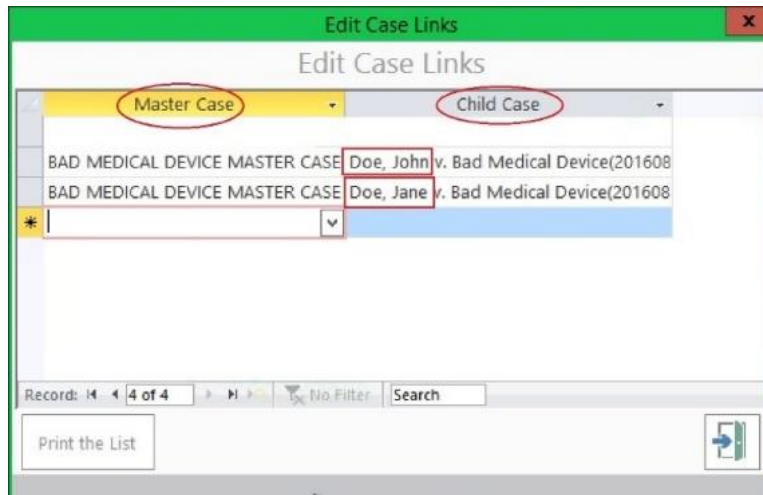
Next, create a case for two clients using the New Case Wizard. For example, create the “Jane Doe” case and the “John Doe” case.

|                            |                                  |
|----------------------------|----------------------------------|
| Case Name:                 | Doe, Jane v. Bad Medical Device  |
| Master Client:             | <input type="text"/> [v] [...]   |
| Liability / Sub-Liability: | Mass Tort [v] Medical Device [v] |

|                            |                                  |
|----------------------------|----------------------------------|
| Case Name:                 | Doe, John v. Bad Medical Device  |
| Master Client:             | <input type="text"/> [v] [...]   |
| Liability / Sub-Liability: | Mass Tort [v] Medical Device [v] |



Now it's time to **link** the Master (Bad Medical Device) Case to the Child Cases (Jane Doe and John Doe.)  
Go to **Settings > More > Case Links**:



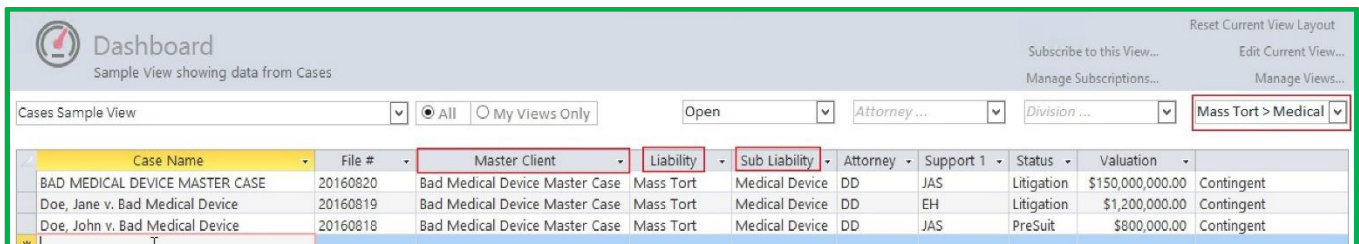
## Dashboard Report

Dashboards can be used to query any information in TrialWorks Intake and Active Cases. Need to know whether a specific template has been used in a case (Plaintiff Fact Sheet) or judge what advertising is working best for Intakes.

To run a report of your Master and Child Cases, go to **Home > Dashboard**



Select the name of the Dashboard, for example, "Case Sample View:"



Any Dashboard can be set up to be automatically emailed on a daily, weekly or monthly schedule. Choose Dashboard Subscriptions to stay current on the status of cases or use them to email your referral counsel.



## Web-Based Client Intake (accessed from a web browser or tablets)

TrialWorks Version 11 includes a customizable web-based Client Intake to help manage all firm inquiries for representation.

File#  ID  Intake Status  Contacts Notes

**Case Information**

**General Info**

Assigned To

Division  Priority

Liability  Sub-Liability

Rainmaker  Prior Representation

**Client Information** Contacted by Injured Party

Also Injured Party  Add to Client [Edit Contact Info](#)

[Clear all Fields](#)

First Name \*  Middle Name  Last Name \*

Salutation  Suffix  Prefix

Company Name

Address

Easy lead creation allows for quick information collecting. The default setup for general demographic data allows the user to flow through fact gathering during a conversation. When more information is needed, an email can be generated containing the missing data fields and the recipient can self-complete when time permits.

Know where your leads are coming from utilizing the Marketing self-building libraries.

File# 12599 | ID 867 | Under consideration | Created by jsenger | Date 02/27/2018 | Injured Party Chloe Johnson

**Marketing Source**

Saw AD on TV  
 Yes  No

Marketing Source

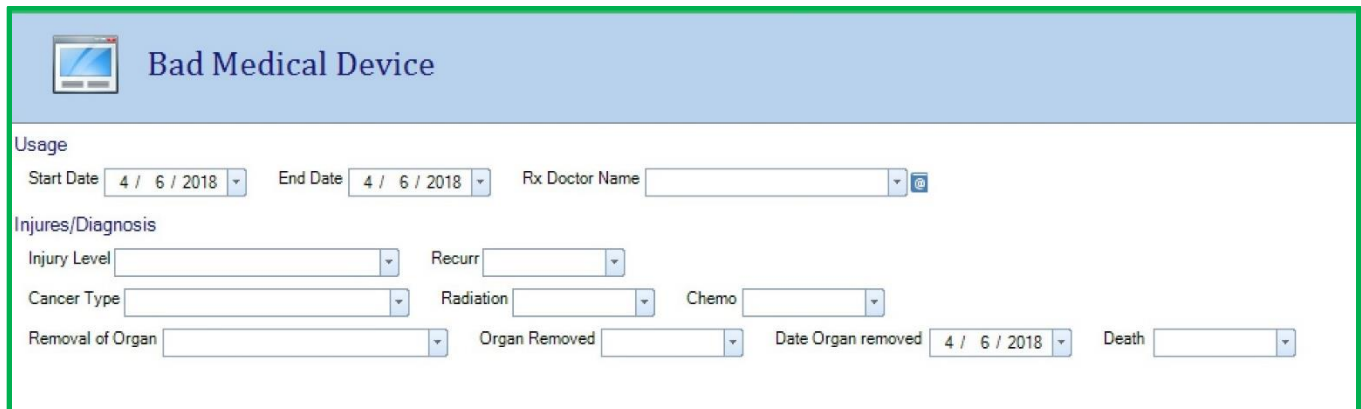
Other Marketing



## User Defined Forms for Mass Tort Cases

TrialWorks supports customizations for Mass Tort cases by providing firms with the ability to design and create forms specific to a specific type of Mass Tort Matter. User Defined Forms are used to create fields **that are not already in TrialWorks** and can be used to generate Intake Forms for new or potential clients. When leads are converted to active cases, that information moves with them.

### EXAMPLE:



The screenshot shows a form titled "Bad Medical Device" with a header bar containing a computer icon and the title. Below the header, the form is organized into sections:

- Usage:** Contains "Start Date" (4 / 6 / 2018), "End Date" (4 / 6 / 2018), and "Rx Doctor Name" (text input with an @ icon).
- Injures/Diagnosis:** Contains "Injury Level" (dropdown), "Recurr" (dropdown), "Cancer Type" (dropdown), "Radiation" (dropdown), "Chemo" (dropdown), "Removal of Organ" (dropdown), "Organ Removed" (dropdown), "Date Organ removed" (4 / 6 / 2018), and "Death" (dropdown).

## Mailing Wizard

Use the Mailing Wizard to create individual letters or fact sheets with just a click. Whether completing submission forms from Dashboards with UDF custom fields or writing to all members of a single Master Case, the Mailing Wizard automates document creation.

For more information about how to manage Mass Tort Cases in TrialWorks, please contact our Training Department at (305) 357-6500.

