

# Using the Negotiations Tab

Version 11 and higher

The Negotiations Tab tracks settlement discussions, while presenting the User with important data from various fields in TrialWorks, including fields that reside on the Case Info, Docket, Wages, Medical and Liens Tabs, enabling the User to conduct settlement negotiations from *one screen*.

## Negotiations Tab Features:

The screenshot shows the Negotiations Tab interface for the case "Looney, Mary Jane v. ABC Moving, Inc." The interface includes a navigation bar with tabs for Summary, History, Case Info, Caption, Contacts, Costs, Deposition, Discovery, Docket, Clients, Notes, Email, Witness Interview, Hearings, Insurance/Liens, Documents, Ancillary, Negotiations, Other Parties, Damages, Pleadings, Research, Subpoena, and Medical. The main content area is divided into several sections:

- Case Info:** A sidebar on the left containing fields for Type of Fee (Contingent), Fee (40%), Total Costs (\$1,575.00), Valuation (\$250,000.00), Referral Atty (Referral Lawyer, Esq), Secondary Referral, Referral% (35%), Liability (Personal Injury), Event Date (8/1/2017), Trial Date (1/2/2019), and Mediation (10/30/2018).
- Outstanding Meds:** A table listing medical bills with columns for Name, Amount Billed, Amount Paid, Balance, Amount Waived, Final Balance, and Lost Wages. It shows two entries: Mary Looney and Sara Smiles.
- Liens:** A table listing liens with columns for Date, Lien Holder, Records Party, Amount Due, and Link. It shows three entries: 1/25/2018 (Custodian, Records Party: Mary Jane Looney, \$550.00), 9/1/2017 (Claim #: 2016-134762954, Lien Holder: Dangerous, Rodney R., \$4,200.00), and 8/1/2017 (Lien Holder: Snow, MD, John D., Party: Mary Jane Looney, \$850.00).
- Negotiations Tracker:** A table listing negotiation events with columns for D/O, Date, Demand Amount, Demanding Party Name, Offer Amount, Offering Party Name, Talked To, Notes, Settlement Authority, Authorized By, Authorization Date, Authorization Amount, Link, and Get a File. It shows four entries: Demand (02/22/2018, \$150,000.00), Offer (01/25/2018, \$0.00), Offer (08/15/2017, \$0.00), and Demand (08/15/2017, \$150,000.00).

## Case Info:

The Case Info section auto-populates the screen with data from fields on various Tabs within TrialWorks including the Case Info and Docket Tabs.

**Case Info**

Type of Fee:

Fee:

Total Costs:

Valuation:

---

Referral Atty:

Secondary Referral:

Referral%:

---

Liability:

Event Date:

Trial Date:

Mediation:

# TRIALWORKS

Tel 305.357.6500 1550 Madruga Ave, Ste 508  
 Fax 305.357.6499 Coral Gables, FL, 33146

[TrialWorks.com](http://TrialWorks.com)  
[Training@TrialWorks.com](mailto:Training@TrialWorks.com)



## Outstanding Meds:

Pulling data from the Medical Tab, the Outstanding Meds section presents the user with the relevant current billing data often needed during settlement negotiations. Additionally, the total

Outstanding Meds							
Name	Amount Billed	Amount Paid	Balance	Amount Waived	Final Balance	Lost Wages	
Mary Looney	\$3,050.00	\$1,625.00	\$1,425.00	\$200.00	\$1,225.00	\$55,000.00	
Sara Smiles	\$475.00	\$25.00	\$450.00	\$0.00	\$450.00	\$0.00	

Record: [Navigation icons] No Filter Search

Lost Wages amount per Client is also presented on the data sheet:

## Liens:

Summary			Amount Due	Link
1/25/2018	Lien Holder: Custodian, Records	Party: Mary Jane Looney	\$550.00	
9/1/2017	Claim #: 2016-134762954	Lien Holder: Dangerous, Rodney R.	\$4,200.00	
8/1/2017	Lien Holder: Snow, MD, John D.	Party: Mary Jane Looney	\$850.00	

Record: [Navigation icons] No Filter Search

Any liens recorded on the Liens Tab are also presented in the Liens section:



## Negotiations Tracker:

To enter information in the Negotiations Tracker section, click in the D/O ("Demand/Offer") column and select either Demand or Offer. Then, complete the corresponding fields on that row:

D/O	Date	Demand Amount	Demanding Party Name	Offer Amount	Offering Party Name
Demand	02/22/2018	\$150,000.00	Mary Jane Looney	\$0.00	
Offer	01/25/2018	\$0.00		\$125,000.00	Donald M. Duck
Offer	08/15/2017	\$0.00		\$1,500.00	Driver of the Truck
Demand	08/15/2017	\$150,000.00	Mary Jane Looney	\$0.00	

Talked To	Notes	Settlement Authority	Authorized By	Authorization Date	Authorization Amount	Link	Get a File
Client	Emailed client.	\$125,000.00	Client	2/1/2018	\$125,000.00		...
Counsel for truck owner.	I called them.	\$0.00			\$150,000.00		...
Counsel for truck driver.	Counsel called.	\$0.00			\$150,000.00		...
Client	Called client.	\$125,000.00	Client	8/14/2017	\$125,000.00		...

➤ **Date** - Date of the Demand or Offer

- **Demand Amount** - Amount of the settlement demand.
- **Demanding Party Name** - The name of the demanding party dropdown pulls from

<input checked="" type="checkbox"/>	Plaintiff
<input type="checkbox"/>	Defendant

the Client and/or Other Parties Tabs, and reflects only those individuals or entities where the **plaintiff checkbox** has been marked.

**OR**

- **Offer Amount** - Amount of the settlement offer.
- **Offering Party Name** - The name of the offering party dropdown pulls from the

<input type="checkbox"/>	Plaintiff
<input checked="" type="checkbox"/>	Defendant

Client and/or Other Parties Tabs, and reflects only those individuals or entities where the **defendant checkbox** has been marked.



- **Talked To** - Party with whom the offer or demand was discussed.
- **Notes** - Any notes about the details of the settlement offer or demand.
- **Settlement Authority** - Amount that will be accepted by the settling party.
- **Authorized By** - Identity of the person authorizing the settlement amount.
- **Authorization Date** - Date authorization to settle for this amount was provided.
- **Authorization Amount** - Amount authorized to settle the case.

