Trialworks

Dashboard Library

As of January 24, 2025, Assembly will no longer create or modify custom dashboards or templates for Trialworks.

The Dashboard Reports listed below are delivered with every new installation of Trialworks at **no additional cost** to the Customer. Existing users may benefit from these dashboards by copying the code into their existing databases.

INSTRUCTIONS:
The code below may be highlighted, copied, and pasted into the SQL Query field to create the dashboard in your environment. From the Home Menu, simply click the Dashboard icon, click "Manage Views," and click the green plus sign to create a new dashboard. Name the Dashboard, provide a brief description, and paste the code in the SQL Query field. Close the door to save the new Dashboard, which will be available in the Dashboard Menu Dropdown.

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2. Birthday List - Next Month
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31. Referrals - Referral Information for All Cases, including Referral Fee, Type of Fee and Percentage
32. Service and Initial Pleadings - Filing of Initial Pleadings and Service Dates
33. SOL (Statute of Limitations) Report - SOL for All Open Cases
34. Timekeeper Report - Data from Timekeeper Entry Form
35. Transaction Logs - Audit reports relating to Trialworks Users

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1. **Birthday List - Birthdays for all Clients**

```sql
SELECT DISTINCT udqCases.[Case Name],
    [First Name],
    [Last Name],
    [Address],
    [City],
    [State],
    [Zip],
    [E-mail],
    [DOB],
    MONTH(DOB) AS [Month],
    DAY(DOB) AS [Day],
    [Case Status Name]
FROM udqClients
INNER JOIN UdqCases ON udqCases.CaseID=udqClients.CaseID
WHERE DOB IS NOT NULL
ORDER BY MONTH(DOB), DAY(DOB)
```

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2. Birthday List - Next Month

```sql
SELECT DISTINCT  [CaseId],
                 [Case Name],
                 [First Name],
                 [Last Name],
                 [Address],
                 [City],
                 [State],
                 [Zip],
                 [DOB],
                 MONTH(DOB) AS [Month],
                 DAY(DOB) AS [Day]
FROM udqClients
WHERE DOB IS NOT NULL AND MONTH(DOB) = CASE WHEN MONTH(GETDATE()) = 12 THEN 1 ELSE
MONTH(GETDATE()) + 1 END
```

3. Docket Report - Calendar - All Docket Entry Form Data

```sql
SELECT [Case Name],
    CAST (CONVERT (varchar, Docket.Date, 101) AS datetime) AS Date,
    LTRIM(RIGHT(CONVERT(VARCHAR(20), Docket.time, 100), 7)) AS [Time],
    AssignedBy,
    Docket.AssignedTo,
    Docket.Descrition As Description,
    CASE WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'Yes')
            ELSE 'No' END AS Completed,
    DateCompleted,
    FileTab,
    CASE WHEN Docket.Remind = 1 THEN CONVERT(VARCHAR,'Yes')
            ELSE 'No' END AS Remind,
    [Days],
    CASE WHEN Docket.Date < GETDATE() THEN CONVERT(VARCHAR,'OVERDUE')
            WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'COMPLETED')
            ELSE CONVERT(VARCHAR, DATEDIFF(DAY, GETDATE(), date)) END AS DaysLeft,
    Docket.Activity,
    CASE WHEN Docket.Adjourned = 1 THEN CONVERT(VARCHAR,'Yes')
            ELSE 'No' END AS Adjourned,
    AdjournedDate,
    Location,
    Details,
    udqcases.CaseId

FROM Docket
INNER JOIN udqCases ON Docket.CaseID=udqCases.CaseID
ORDER BY [Case Name]
```

4. Docket Report – Fast Tracks - All Docket Entries including FastTrack Designation

```sql
SELECT [Case Name],
    [Master Client],
    Attorney,
    [Support 1],
    [Status],
    CAST(CONVERT(varchar, Docket.Date, 101) AS datetime) AS Date,
    CONVERT(VARCHAR(8),Docket.time,108) AS Time,
    AssignedTo,
    Activity,
    Docket.Descrition As Description,
    FileTab,
    (CASE WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'Yes')
            ELSE 'No' END) AS [Completed?],
    DateCompleted,
    UDqcases.caseID
FROM Docket
INNER JOIN udqCases ON Docket.caseID=udqCases.caseID
WHERE FileTab Like 'FT%'
AND Completed=0
```

5. Docket Report - Important Dates - All Dates from Date Info Button on Docket Tab

```sql
SELECT [Case Name], [File #],
    [Case Status Name], [Status],
    [Sub Status], [Liability],
    [Pre-trial Conf. Date], [Calendar Call],
    [Mediation/Settlement], [Arbitration],
    [Trial Date], [Second Trial Date],
    [Date of Filing], [Informational Stmt],
    [Add'l Parties Joined], [Mediation Deadline],
    [Pltf. Experts Disclosed],[Def. Experts Disclosed],
    [Appeal Date], [Trial Not Before Date],
    [RJI], [Note of Issue],
    [Status Conference],[Discovery],
    [Discovery Cut Off],
    [Case Management Conference],
    [First Client Meeting],
    [IME Completed],
    [Inform Court of Mediator],
    [Disp. Motions Sched],
    [Non-Disp. Motions Sch],
    [Binding Arbitration Date],
    [Motions in Limine],
    [Expert],
    [Lay Witness],
    [Deposition],
    [SJMotion],
    [Exhibits],
    [Trial Brief],
    [Jury Instructions],
    [Jury Inst./Sp. Verdict Deadline],
    [Statement of Cause],
    [Disp. Motions heard],
    [Non-Disp. Motions Heard],
    [Witness Exhibit Deadline],
    [Contract Court Approved],
    udqCases.CaseID

FROM udqCases
INNER JOIN udqCaseImportandDates ON udqCases.CaseID = udqCaseImportandDates.CaseID
ORDER BY [Case Name]
```

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6. Docket Report - Appearances - All Docket Activities with Docket Category = Appearances

```sql
SELECT [Case Name],
[File #],
Liability,
CAST(CONVERT(varchar, Docket.Date, 101) AS datetime) AS [Date],
LTRIM(RIGHT(CONVERT(VARCHAR(20), Docket.time, 100), 7)) AS [Time],
    AssignedBy,
    Docket.AssignedTo,
    Docket.Descrition As Description,
    CASE WHEN Docket.Completed = 1 THEN CONVERT(VARCHAR,'Yes')
            ELSE 'No' END AS Completed,
    DateCompleted,
    FileTab,
    CASE WHEN Docket.Remind = 1 THEN CONVERT(VARCHAR,'Yes')
            ELSE 'No' END AS Remind,
    Docket.Activity,
    Location,
    Details,
    udqcases.CaseId
FROM Docket
INNER JOIN udqCases ON Docket.CaseID=udqCases.CaseID
INNER JOIN DocketCategory DC ON DC.Activity=Docket.Activity
WHERE DC.Category LIKE 'Appearances%'
ORDER BY [Case Name]
```

7. Call Log - Details from Call Log Entry Form

```sql
SELECT [Case Name],
    [File #],
    [Master Client],
    [Save As] AS [Caller],
    CAST(CONVERT(varchar,StartDate,101) AS Datetime) AS [Call Date],
    LTRIM(RIGHT(CONVERT(VARCHAR(20), StartDate, 100), 7)) AS [Start Time],
    LTRIM(RIGHT(CONVERT(VARCHAR(20), EndDate, 100), 7)) AS [End Time],
    User AS [Author],
    [StatusNoteCode],
    [CalledFor],
    Calls.[Notes],
    udqCases.CaseID

FROM Udqcases
INNER JOIN Calls ON udqCases.CaseId=Calls.CaseID
LEFT JOIN UdqContacts ON UdqContacts.ContactsID=Calls.ContactsId
```

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8. Captions View - All Cases - Sample View of Data from Caption Tab

```sql
SELECT UdqCases.[Case Name],
    [Master Client],
    Plaintiffs,
    Defendants,
    [Case/Index#],
    Judge,
    [Court Name],
    [County/Venue]
    [Court Address],
    [Court Division]
    [Court City],
    [Court State],
    CourtZipCode,
    [Room No],
    Arbitrator,
    UdqCases.CaseID
FROM udqCaptions
INNER JOIN UdqCases ON UdqCases.caseID=udqCaptions.CaseID

ORDER BY UdqCases.[Case Name]
```

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9. Case List - Sample View of Data from Case Info Tab

```sql
SELECT [Case Name],
    [File #],
    [Date Created],
    [Created by],
    [Case Status Name],
    [Master Client],
    [Division],
    [Attorney],
    [Support 1],
    [Support 2],
    [Support 3],
    [Liability],
    [Sub Liability],
    [Referral],
    [Secondary Referral Source],
    [Rainmaker],
    [Referred Out],
    [Date Closed],
    [Status],
    [Status Note],
    [Sub Status],
    [Sub Note],
    [Sub Status1],
    [Sub Note1],
    [Priority Code],
    [Priority Note],
    [Additional Status],
    [CaseId]

FROM [dbo].[udqCases]
Order By [Case Name]
```

10. Case List - Intake Cases Full View - All Details from Intake Cases Manager Wizard

```sql
SELECT * FROM udqIntakeCases Order By [Intake Case Name]
```

11. Case List - Intakes List - Selected Fields from the Intake Cases Manager Wizard

```sql
SELECT [Intake Case Name]
    [Intake File #],
    ContactedBy,
    InjuredParty,
    [Date Created],
    Referral,
    [Intake Status],
    [Status],
    [Status1],
    [Status2],
    [Liability],
    [SubLiability],
    [AssignedTo],
    Rainmaker,
    MarketingSource,
    (SELECT Division FROM IntakeCases WHERE IntakeCaseID=udqIntakeCases.IntakeCaseID)
AS
    [Division],
    CASE WHEN TWCaseID >0 THEN 'Yes' ELSE 'No' END AS [Created in TW],
    [IntakeCaseID]

FROM udqIntakeCases
Order By [IntakeCaseID]
```

12. Case Settlement Report - Settlement Information by Case

```sql
SELECT [Case Name],
    [File #],
    [Master Client],
    [Case Status Name],
    [Status],
    [Sub Status],
    [Sub Status1],
    [Priority Code],
    [Liability],
    [Expected Settlement Date],
    [Settlement Date],
    [Settlement Amount],
    [Date Release Sent to Client],
    [Date Release Sent to Insurance],
    [Total Paid],
    [Balance],
    udqCases.CaseID
FROM udqCases
INNER JOIN udqCaseSettlement ON udqCases.CaseID = udqCaseSettlement.CaseID
ORDER BY [Case Name]
```

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13. Client Mailing List - All Clients List for Mass Mailings

```sql
SELECT udqCases.[Case Name],
    [File #],
    [Party Name] AS [Client Name],
    [Address],
    [City],
    [State],
    [Zip],
    [E-mail],
    [Date Created],
    [Master Client],
    ContactsID,
    udqCases.CaseID

FROM udqCases
INNER JOIN udqClients ON Udqcases.CaseId=UdqClients.CaseID
WHERE [Party Name] <> 'Party' AND [Party Name] IS NOT NULL
ORDER BY udqCases.[Case Name]
```

14. Client Settlement Report - Settlement Information by Client

```sql
SELECT [Case Name],
    [File #],
    [Case Status Name],
    [Master Client],
    [Status],
    [Sub Status],
    [Liability],
    [Client Name],
    Referral,
    [Expected Settlement Date],
    [Settlement Date],
    [Settlement Amount],
    [Total Settlement (All Clients)],
    [Date Release Sent to Client],
    [Date Release Sent to Insurance],
    [Total Paid],
    [Balance],
    udqCases.CaseID
FROM udqCases
INNER JOIN udqClientSettlement ON udqCases.CaseID = udqClientSettlement.CaseID
ORDER BY [Case Name]
```

15. Closed Cases - List of Closed Cases

```sql
SELECT [Case Name],
    [File #],
    Liability,
    Attorney,
    [Case Status Name],
    [Status],
    [Date Closed],
    udqCases.CaseId
FROM udqCases
WHERE [Case Status]=3
ORDER BY [Case Name]
```

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16. Conflicts Report by Case - Contacts Associated with the Case

```sql
SELECT udqCases.[Case Name],
    [File #],
    [Case Status Name],
    [Contact Type],
    LastName,
    FirstName,
    CompanyName,
    Address,
    City,
    State,
    ZipCode,
    PhoneNumber,
    DOB,
    Contacts.Notes

FROM Contacts
LEFT JOIN CaseContacts CC ON CC.ContactsID=Contacts.ContactsId
LEFT JOIN Udqcases ON Udqcases.CaseID= CC.caseID
LEFT JOIN ContactType CT ON Contacts.ContactsId=CT.ContactsId
LEFT JOIN [Contact Types] ON CT.ContactTypesId= [Contact Types].[Primary]
WHERE UdqCases.CaseID=dbo.fn_GetCurrentCaseID()
ORDER BY [LastName],[FirstName]
```

17. Contacts Full View - All Data from Contacts Entry Form

```sql
SELECT * FROM udqContacts ORDER BY [Save As]
```

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18. Contacts Mailing List - All Contacts List for Mass Mailings

```sql
SELECT [dbo].[fn_GetFullName] (Title, FirstName, MiddleInitial, LastName, Suffix) AS
[Full Name],
    CompanyName,
    Title,
    Address,
    City,
    State,
    ZipCode,
    dbo.fn_CleanPhoneNo(HomePhone) AS [Home Phone],
    dbo.fn_CleanPhoneNo(PhoneNumber) AS [Work Phone],
    dbo.fn_CleanPhoneNo(CarPhone) AS [Cell Phone],
    EmailAddress,
    DOB,
    Specialty,
    InternalType AS [Primary Type],
    [dbo].[fn_GetContactTypes](Contacts.ContactsId, 0) AS [Types],
    Contacts.ContactsId
FROM Contacts
ORDER BY [Full Name]
```

19. Costs - Total Costs Report - Total Expenses by Case from Costs Tab

```sql
SELECT [Case Name],
    [File #],
    [Case Status Name],
    [Status],
    [Sub Status],
    [Liability],
    [Total Cost],
    [Total Reduction],
    [Total Amount Due],
    udqCases.CaseID
FROM udqCases
INNER JOIN udqCostTotals ON udqCases.CaseID = udqCostTotals.CaseID
ORDER BY [Case Name]
```

20. Insurance Report - All Insurance Information by Case

```sql
SELECT [Case Name],
    [File #],
    [Master Client],
    InsType,
    Insurance.Party,
    Ins.CompanyName AS [Insurance Company],
    Adj.SaveAs AS [Adjuster],
    PolicyNo,
    ClaimNo,
    PolicyLimits,
    Deductable AS [Deductible],
    [InsuredParty],
    CoverageStartDate,
    CoverageEndDate,
    PercentCoverage,
    Insurance.Notes,
    udqCases.CaseId
FROM udqCases
INNER JOIN Insurance ON Insurance.CaseId = udqCases.CaseId
INNER JOIN Contacts Ins ON Ins.ContactsId = Insurance.InsuranceId
LEFT JOIN Contacts Adj ON Adj.ContactsId = Insurance.AdjusterId
ORDER BY [Case Name]
```

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21. Liens Tracker - All Cases - Liens Data from Insurance/Liens Tab for All Cases

```sql
SELECT UdqCases.[Case Name],
    [File #],
    [Master Client],
    [Party Name],
    CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Claim Date],
    ClaimNo AS [Claim #],
    Rep.[Save As] AS [Lien Rep],
    Amount,
    Reduction,
    AmountDue,
    Holder.[Save As] AS [LienHolder Name],
    CASE WHEN FirmPaid=1 THEN 'Yes' ELSE 'No' END AS [Firm Paid?],
    DatePaid,
    FirmCheckNumber,
    Liens.Notes,
    UdqCases.CaseID
FROM UdqCases
INNER JOIN Liens ON UdqCases.CaseID=Liens.CaseID
LEFT JOIN udqClients ON udqClients.ClientID=Liens.ClientID
LEFT JOIN UdqContacts Rep ON Rep.ContactsID=Liens.LienRep
LEFT JOIN UdqContacts holder ON holder.ContactsID=Liens.NameOfLienHolder
```

22. Liens Tracker - By Current Case - Liens Data from Insurance/Liens Tab By Current Case

```sql
SELECT UdqCases.[Case Name],
    [File #],
    [Master Client],
    [Party Name],
    CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Claim Date],
    ClaimNo AS [Claim #],
    Rep.[Save As] AS [Lien Rep],
    FirmCheckNumber,
    Liens.Notes,
    UdqCases.CaseID
FROM UdqCases
INNER JOIN Liens ON UdqCases.CaseID=Liens.CaseID
LEFT JOIN udqClients ON udqClients.ClientID=Liens.ClientID
LEFT JOIN UdqContacts Rep ON Rep.ContactsID=Liens.LienRep
LEFT JOIN UdqContacts holder ON holder.ContactsID=Liens.NameOfLienHolder
WHERE UdqCases.CaseID=Dbo.fn_GetCurrentCaseID()
```

23. Marketing and All Referral Sources - Data from Marketing and Referral Fields

```sql
SELECT CASE WHEN UdqCases.[Case Name]> '0' THEN
            CAST([Case Name] AS CHAR(255))
            WHEN [Case Name]IS NULL THEN
            CAST([Intake Case Name] AS CHAR(255))
            END AS [Case Name],
    CASE WHEN [Case Name]> '0' THEN
            CaseMarketing.MarketingSource
            WHEN [Case Name]IS NULL THEN
            udqIntakeCases.MarketingSource
            END AS [MarketingSource],
    CASE WHEN [Case Name]> '0' THEN
            MTUMarketingSource
            WHEN [Case Name]IS NULL THEN
            udqIntakeCases.[Other Marketing Source]
            END AS [Other MarketingSource],
    CASE WHEN [Case Name]> '0' THEN
            udqCases.Referral
            WHEN [Case Name]IS NULL THEN
            udqIntakeCases.Referral
            END AS [Referral],
    CASE WHEN [Case Name]> '0' THEN
            udqCases.[Secondary Referral Source]
            WHEN [Case Name]IS NULL THEN
            udqIntakeCases.Referral2
            END AS [Secondary Referral],
UdqCases.CaseId
FROM udqCases
LEFT OUTER JOIN CaseMarketing ON udqCases.CaseId=CaseMarketing.CaseID
FULL OUTER JOIN udqIntakeCases ON udqCases.CaseId=udqIntakeCases.TWCaseID
ORDER BY [Case Name]
```

24. Medical Cost Totals Report [EMSI] - Summary of Costs for Medicals [from EMSI Integration]

```sql
SELECT UdqCases.[Case Name],
    Saveas AS [Provider Name],
    UdqClients.[Party Name] AS [Patient],
    (CASE WHEN RecordType LIKE 'MEDI%' THEN 'Medical'
            WHEN RecordType LIKE 'BILL%' THEN 'Billing'
            WHEN RecordType LIKE 'FILM%' THEN 'Film'
            WHEN RecordType LIKE 'OTH%' THEN 'Other'
            ELSE '' END) AS [Record Type],
    (CASE WHEN RecordType LIKE '%STND%' THEN 'Standard'
            WHEN RecordType LIKE '%RUSH%' THEN 'Rush'
            ELSE '' END)AS [Type of Service],
    (CASE WHEN Canceled=1 THEN 'Yes' ELSE 'No' END) AS [Cancelled Requests],
    CAST(CONVERT(Varchar,Medical.[Date Requested],101) AS Datetime) AS [Date
Requested],
    CAST(CONVERT(Varchar,Medical.MedRecordsDate,101) AS Datetime) AS [Date Records
    Received],
    Attorney,
    [EMSI Fee],
    [Provider Fee],
    MediConnect.[User] AS [Requested User Name],
    RequestID,
    Udqcases.CaseID

FROM MediConnect
INNER JOIN Medical ON Mediconnect.DrVisitId= Medical.DrVisitID
LEFT JOIN Contacts ON Contacts.ContactsID=Medical.Doctor
INNER JOIN UdqCases ON Medical.CaseID=UdqCases.CaseID
LEFT JOIN (SELECT SUM(AmountDue) AS [EMSI Fee],
    ProviderRequestID
    FROM Expense WHERE Description LIKE 'EMSI FEE-ALL CASES' GROUP
BY ProviderRequestID) EMSI ON EMSI.ProviderRequestID=Mediconnect.RequestID
LEFT JOIN (SELECT SUM(AmountDue) AS [Provider Fee],
    ProviderRequestID
    FROM Expense WHERE Description LIKE 'RECORDS FEE' GROUP BY
ProviderRequestID) Provid ON Provid.ProviderRequestID=Mediconnect.RequestID
LEFT JOIN udqClients ON Medical.ClientId=UdqClients.ClientID
WHERE MediConnect.EMSI=1

ORDER BY UdqCases.[Case Name]
```

25. Medical Costs Totals Report - Medical Costs Totals by Case

```sql
SELECT [Case Name],
    [File #],
    [Case Status Name],
    [Status],
    [Sub Status],
    [Liability],
    [Party Name],
    [Total Bill],
    [Total Amount Paid],
    [Balance],
    [Total Amount Waived],
    [Final Balance Due],
    udqCases.CaseID
FROM udqCases
INNER JOIN udqMedicalTotals ON udqCases.CaseID = udqMedicalTotals.CaseID
ORDER BY [Case Name], [Party Name]
```

26. Medical Provider Summary Report - All Medical Providers by Case

```sql
SELECT [Case Name],
    [Master Client],
    CASE WHEN IsDefendant = 1 THEN [Adverse Parties].PartyName ELSE Clients.PartyName
    END AS [Party Name],
    DR.CompanyName AS [Provider],
    CAST(CONVERT(varchar, Medical.[Date], 101) AS datetime) AS [Treatment Start Date],
    CAST(CONVERT(varchar, Medical.EndDate, 101) AS datetime) AS [Treatment End Date],
    [Paid By] = STUFF((
            SELECT N'; ' + P.SaveAs FROM MedPayments
            INNER JOIN Contacts P ON P.ContactsId = MedPayments.Payer
            WHERE DrVisitID = Medical.DrVisitID
            FOR XML PATH(''), TYPE).value(N'.[1]', N'nvarchar(max)'), 1, 2, N''),
    CAST([Bill] AS money) AS [Billed],
    CAST([Amount Paid] as money) AS [Amount Paid],
    CAST(ISNULL([Bill], 0) - ISNULL([Amount Paid], 0) AS money) AS [Balance],
    CAST([AmountWaived] AS money) AS [Amount Waived],
    CAST(ISNULL([Bill], 0) - ISNULL([Amount Paid], 0) - ISNULL([AmountWaived], 0)
    AS money) AS [Final Balance Due],
    udqCases.CaseId
FROM udqCases
INNER JOIN Medical ON Medical.CaseId = udqCases.CaseId
LEFT JOIN Contacts DR ON DR.ContactsId = Medical.Doctor
LEFT JOIN Clients ON Clients.ClientID = Medical.ClientId AND Medical.IsDefendant = 0
LEFT JOIN [Adverse Parties] ON [Adverse Parties].ClientID = Medical.ClientId AND
Medical.IsDefendant = 1
ORDER BY [Case Name]
```

27. Medical Requests Outstanding - List of All Outstanding Medical Record Requests

```sql
SELECT udqCases.[Case Name],
    PartyName as [Client Name],
    [File #],
    [Master Client],
    (SELECT SaveAs FROM Contacts WHERE ContactsId = Doctor) AS [Medical Provider],
    CAST(CONVERT(varchar, Medical.[Date], 101) AS datetime) AS [Treatment StartDate],
    CAST(CONVERT(varchar, Medical.[Date], 101) AS datetime) AS [Treatment EndDate],
    CAST(Bill AS Money) AS Bill,
    CAST(CONVERT(varchar, Medical.[Date Requested], 101) AS datetime) AS [Date
Requested],
    DATEDIFF(Day,Medical.[Date Requested],GETDATE()) [Days since Requested],
    CAST(CONVERT(varchar, Medical.DateRecvd, 101) AS datetime) AS [Date Received],
    CAST(CONVERT(varchar, Medical.FollowUpDate, 101) AS datetime) AS [Follow Up Date],
     DC.DocCategory AS Category,
     udqCases.CaseId
FROM udqCases
INNER JOIN Clients ON udqCases.CaseId = Clients.CaseId
INNER JOIN Medical ON Clients.ClientID = Medical.ClientId
LEFT JOIN DocCategories DC ON Dc.CategoryId=Medical.CategoryID AND
CategoryTab='Medical'
WHERE [Received Medical Records]=0
AND [Requested Medical Records]=1
ORDER BY [CaseName]
```

28. Negotiations Tracker - All Cases - Data from Negotiations Tab for All Cases

```sql
SELECT [Case Name],
    [File #],
    [Master Client],
    [Demand or Offer],
    CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Date],
    DemandAmount,
    ReceivingPartyName AS [Demanding PartyName],
    OfferAmount,
    OfferingPartyName,
    [Talked To],
    Notes,
    SettlementAuthority,
    AuthorizedBy,
    AuthorizationDate,
    AuthorizationAmount,
    [Total Medical Bill],
    [Total Amount of Lien],
    [Total Cost],
    [Type of Fee],
    Fee,
    Referral,
    [Referral  Fee or %],
    UdqCases.CaseID
FROM UdqCases
INNER JOIN [Demand SubTable] ON UdqCases.CaseID=[Demand SubTable].CaseID
LEFT JOIN udqCostTotals ON UdqCases.CaseID=udqCostTotals.CaseID
LEFT JOIN udqLienTotals ON UdqCases.CaseID=udqLienTotals.CaseID
LEFT JOIN (SELECT CaseID,SUM([Total Bill]) AS [Total Medical Bill]
FROM udqMedicalTotals GROUP BY CaseID) Med ON Med.CaseID=UdqCases.CaseID
```

29. Negotiations Tracker - By Current Case - Data from Negotiations Tab by Current Case Only

```sql
SELECT [Case Name],
    [File #],
    [Master Client],
    [Demand or Offer],
    CAST(CONVERT(Varchar,Date,101) AS Datetime) AS [Date],
    DemandAmount,
    ReceivingPartyName AS [Demanding PartyName],
    OfferAmount,
    OfferingPartyName,
    [Talked To],
    Notes,
    SettlementAuthority,
    AuthorizedBy,
    AuthorizationDate,
    AuthorizationAmount,
    [Total Medical Bill],
    [Total Amount of Lien],
    [Total Cost],
    [Type of Fee],
    Fee,
    Referral,
    [Referral  Fee or %],
    UdqCases.CaseID
FROM UdqCases
INNER JOIN [Demand SubTable] ON UdqCases.CaseID=[Demand SubTable].CaseID
LEFT JOIN udqCostTotals ON UdqCases.CaseID=udqCostTotals.CaseID
LEFT JOIN udqLienTotals ON UdqCases.CaseID=udqLienTotals.CaseID
LEFT JOIN (SELECT CaseID,SUM([Total Bill]) AS [Total Medical Bill]
FROM udqMedicalTotals GROUP BY CaseID) Med ON Med.CaseID=UdqCases.CaseID
WHERE UdqCases.CaseID=Dbo.fn_GetCurrentCaseID()
```

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30. Other Parties Information - Data from Other Parties Tab

```sql
SELECT * FROM udqOtherParties ORDER BY [Case Name], [Party Name]
```

31. Referrals - Referral Information for All Cases, including Referral Fee, Type of Fee and Percentage

```sql
SELECT Udqcases.[Case Name],
    [File #],
    [Master Client],
    Liability,
    [Case Status Name],
    [Status],
    [Type of Fee],
    Fee,
    Referral,
    [Referral 2],
    [Referral 3],
    [Referral  Fee],
    [Referral  Fee or %],
    [Secondary Referral Source],
    udqCases.CaseId
FROM UdqCases
ORDER BY [Case Name]
```

32. **Service and Initial Pleadings - Filing of Initial Pleadings and Service Dates**

```sql
SELECT Udqcases.[Case Name],
    udqClients.[Party Name] Client,
    [Event Date (DOA)] DOA,
    udqOtherParties.[Party Name],
    [Service Date],
    [Service Deadline],
    [Answer Filed],
    [Date Complaint Filed],
    SOL.SOLType,
    CAST(CONVERT(varchar,SOL.SOLDate,101) As datetime) AS SOLDate,
    CAST(CONVERT(varchar,SOL.CompliedDate,101) As datetime) AS CompliedDate,
     udqCases.CaseId
FROM UdqCases
LEFT JOIN udqClients ON udqCases.CaseID=udqClients.CaseId AND
ClientID=Dbo.fn_GetFirstClientID(udqCases.CaseId) AND udqClients.[Party Name]
<>'Party'
LEFT JOIN udqOtherParties ON udqCases.CaseId=udqOtherParties.CaseID AND
udqOtherParties.[Party Name]<>'Party'
LEFT JOIN SOL ON Sol.CaseId=udqCases.CaseID AND SOL.ClientId=udqClients.ClientID

ORDER BY [Case Name]
```

33. SOL (Statute of Limitations) Report - SOL for All Open Cases

```sql
SELECT udqCasesAll.[Case Name],
    [File #],
    [Party Name],
    [Date of Filing],
    CAST(CONVERT(varchar, SOL.DOA, 101) AS datetime) AS [DOA],
    CAST(CONVERT(varchar, SOL.SOLDate, 101) AS datetime) AS [SOL],
    Payee AS [Master Client],
    CASE WHEN SOL.Complied=1 THEN 'Yes' ELSE 'No' END AS [Complied],
    CompliedDate,
    udqCasesAll.CaseId
FROM udqCasesAll
LEFT JOIN udqClients ON udqClients.CaseId = udqCasesAll.CaseId
INNER JOIN SOL ON SOL.CaseId = udqClients.CaseId AND SOL.ClientId =
udqClients.ClientID
WHERE [Case Status] = 2
ORDER BY udqCasesAll.[Case Name]
```

34. Timekeeper Report - Data from Timekeeper Entry Form

```sql
SELECT [Case Name],
    [File #],
    CAST(CONVERT(varchar,BillingDateRaw,101) AS Datetime) AS [Date],
    CONVERT(Varchar(8),Time,108) AS [Time],
    TimeBilled.PClawUserID AS Author,
    [Hours] AS [Billable Hours],
    HoursWorked,
    HourlyRate,
    ([HourlyRate]*[Hours]) AS TotalAmount,
    (Case When TimeBilled.Billed=1 THEN 'Yes' Else 'No' End) AS Billed,
    BilledDate,
    (Case When TimeBilled.BillableTime=1 THEN 'Yes' Else 'No' End) AS [BillableTime],
    TaskCode,
    [MasterClient],
    ActivityCode,
    Explanation,
    [Priority Code],
    udqCases.CaseID
FROM Udqcases
INNER JOIN TimeBilled ON udqCases.CaseId=Timebilled.CaseID
```

35. Transaction Logs - Audit reports relating to Trialworks Users

```sql
SELECT CaseID,
    CaseName,
    UserName,
    TransactionDate,
    TransactionComments,
    TransactionChgComments,
    Log
    FROM Transactions
    WHERE DATEDIFF(Year,TransactionDate, GETDATE())= 0
    OR CAST(TransactionDate AS Date)= CAST(DATEADD(Day,-92,DATEADD(yy, DATEDIFF(yy, 0,
GETDATE()),
    0)) AS Date)

ORDER BY TransactionDate DESC
```