

# The 50 Fields Worth Fighting For

NO.	FIELD	TYPE	DATA	NOTES
1	Date of Incident	Date		
2	Date Opened	Date		Date file was opened.
3	Client Name	Contact		Name of client.
4	Attorney	Staff		Attorney in charge of the case.
5	Assistant	Staff		Assistant assigned to the case.
6	Case Type	Dropdown		
7	Case Sub Type	Dropdown		
8	Status	Dropdown		Field you use to track status.
9	Synopsis	Text		Description of how the incident occurred.
10	Date Ready to Close	Date		Date you start the file closure process.
11	Personal Information	Text		FORD, Family, Occupation, Recreation, Dreams, Also, reason for VIP if they are.
12	Referred To	Contact		Firm that you have referred the case to.
13	Lead Source: General	Dropdown		
14	Lead Source: Specific	Party		
15	Defendant in Rideshare	Dropdown	Potential Yes No	
16	Date of Statute of Limitations	Date		
17	Date Suit Filed	Date		
18	Date of Mediation	Date		
19	Date of Trial	Date		
20	Injury Severity Rating	Dropdown	1: No injuries 2: Developing Injuries 3: Serious: Surgery, hospital stay, broken bones. 4: Catastrophic: Paralysis, loss of limb 5: Death	
21	Prior Injuries	Text		Description of injuries and incidents before this case.
22	Injuries	Text		Brief description of injuries.
23	Treatment Status	Dropdown	Treating: Has appointment scheduled Treating: Needs appointment scheduled Treating: No appointment necessary Client in pain, but doesn't want to treat Finished Treating	
24	Treatment Notes	Text		Short description of any details from treatment status, MRI, Injection, Surgery Status sections.
25	MRI Status	Dropdown	Per attorney, MRI not an option Client doesn't want to do MRI MRI Complete: Normal MRI Complete: Positive Need to Schedule Scheduled	
26	Injection Status	Dropdown	Per Attorney, not an injection case Need to Schedule Potential Injection Case Injections Recommended: Scheduling Injections Recommended: Client doesn't want Injection(s) Started	
27	Surgery Status	Dropdown	Per attorney, not a surgery case Potential Surgery Case Need to Schedule Scheduled Surgery Recommended: Client doesn't want Surgery Completed	
28	TBI Status	Dropdown	Per attorney, not a TBI Case, No Questionnaire Questionnaire Completed: Not a TBI Case Questionnaire Completed: Potential TBI Case Initial TBI Testing Scheduled TBI Testing Recommended: Client Doesn't Want TBI Testing Complete: Negative TBI Testing Complete: Positive	
29	Case Rank	Dropdown	A++ A+ A A- B C+ C C- F Pro Bono	
30	Date Get Demand Ready	Date		Date you decide to start putting a demand letter together.
31	Date of First Demand	Date		Date first demand package goes out.
32	Liability Coverage Amount	Currency		Amount of liability coverage.
33	Coverage Notes	Text		Notes on liability coverage
34	UM Coverage Amount	Currency		Amount of UM Coverage
35	MSV	Currency		Maximum Settlement Value
36	TOP value	Currency		Top Value
37	Gross Fees Recovered	Currency		Gross fees on case so far.
38	Offer on Table	Currency		Any offer on the table from defendant.
39	Commercial Policy Involved	Dropdown	Potential Yes No	We think person was in course and scope.
40	Future Medicals	Dropdown	Per attorney, no future workup Potential Future Workup Future Workup in Progress Future Workup Complete	
41	Excess Judgment Status	Dropdown	Per attorney, not pursuing excess judgment Potential Policy Pop Case Setting up for Excess Open Policy	
42	Valuation Notes	Text		Notes relating to the value of the case and why it is valued that way.
43	Negotiation Status	Dropdown	Ready to Negotiate Needs Additional Workup	
44	MedicalBills	Currency		Total amount of medical bills incurred so far.
45	Date of Last Client Contact	Date		Last date someone from the firm talked to client.
46	Date of Last File Review	Date		Last date someone reviewed the file.
47	Date of Last Attorney Contact	Date		Last time the attorney spoke with this client.
48	Date to Follow Up on Case	Date		Date you need to circle back to review this case in valuation committee.
49	Closed No Fee Reasons	Dropdown		
50	Closed Case Notes	Text		