

The 50 Fields Worth Fighting For

			Worth Fight	
NO.	Field Date of Incident	Type Date	Data	Notes
2	Date of incident Date Opened	Date		Date file was opened.
3	Client Name	Contact		Name of client.
4	Attorney	Staff		Attorney in charge of the case.
5 6	Assistant Case Type	Staff Dropdown		Assistant assigned to the case.
7	Case Type Case Subtype	Dropdown		
8	Status	Dropdown		Field you use to track status.
9	Synopsis	Text		Description of how the incident occurred.
10 11	Date Ready to Close Personal Information	Date Text		Date you start the file closure process. FORD. Family, Occupation, Recreation,
				Dreams. Also, reason for VIP if they are.
12 13	Referred To Lead Source: General	Contact Dropdown		Firm that you have referred the case to.
14	Lead Source: Specific	Party		
15	Defendant in Rideshare	Dropdown	PotentialYes	
			• No	
16 17	Date of Statute of Limitations Date Suit Filed	Date Date		
18	Date of Mediation	Date		
19	Date of Trial	Date		
20	Injury Severity Rating	Dropdown	 No injuries Developing injuries Serious: Surgery, hospital stay, broken bones Catastrophic: Paralysis, loss of limb 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
25	MDLStatus	Dropdow	Dor attorney MDL met	Status sections.
25	MRI Status	Dropdown	 Per attorney, MRI not an option Doctor will not recommend Recommended, client considering MRI Complete: Normal MRI Complete: Positive Recommended, need to schedule Scheduled Potential MRI case 	
26	Injection Status	Dropdown	 Per attorney, not an injection case Potential injection case Injections Recommended: Scheduling Injections Recommended: Client considering Scheduled Injection(s) Started 	
27	Surgery Status	Dropdown	 Per attorney, not a surgery case Potential surgery case Recommended: Need to schedule Scheduled Recommended: Client considering 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 34	Coverage Notes UM Coverage Amount	Text Currency		Notes on liability coverage. Amount of UM coverage.
34 35	UM Coverage Amount MSV	Currency		Amount of UM coverage. Maximum Settlement Value.
36	TOP Value	Currency		Top Value.
37 38	Gross Fees Recovered Offer on Table	Currency		Gross fees on case so far. Any offer on the table from defendant
38	Commercial Policy Involved	Currency Dropdown	 Potential 	Any offer on the table from defendant.
40	Future Medicals	Dropdown	 Yes No Per attorney, no future workup Potential future workup Future workup in progress 	
41	Excess Judgment Status	Dropdown	 Future workup complete Per attorney, not pursuing excess judgment Potential Policy pop case Setting up for excess 	
42	Valuation Notes	Text	Open policy	Notes relating to the value of the case
				and why it is valued that way.
43	Negotiation Status	Dropdown	Ready to negotiateNeeds additional workup	
44	Medical Bills	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 47	Date of Last File Review Date of Last Attorney Contact	Date		Last date someone reviewed the file. Last time the attorney spoke with this client.
	Date to Follow Up on Case	Date		Date you need to circle back to review

Date you need to circle back to review this case in valuation committee.

Text

Dropdown

Closed No Fee Reasons

Closed Case Notes

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