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# SmartAdvocate®

Get Smart About Organizing and Automating Your Personal Injury and Mass Tort Cases Complete with Intake, Document Management, and Reporting Functionality

“ SmartAdvocate has all of the tools necessary to successfully operate a personal injury law firm with incredible efficiency. The ability to text and e-sign right from within the program is a game changer in terms of client satisfaction. Ordering medical records is simplified to a few clicks and tracking those requests is totally transparent.”

Steve Malman, President of Malman Law, Chicago

“ Helpfully, SmartAdvocate remembers the last view of a dashboard or panel when you exit and return.”

## Latest Developments and Updates

- Send documents to clients via text or email for electronic signature.
- New case intake wizard includes options for conditional and required questions.
- Push appointments from Outlook into SmartAdvocate.
- Two-factor authentication available.

Wouldn't it be nice to use legal software that was actually designed by a lawyer? If you're a personal injury or mass tort attorney, then you need to look at [SmartAdvocate](#) because it was developed by a plaintiff's attorney to provide reliable and comprehensive information on all of the aspects of a large number of cases.

The goal in creating SmartAdvocate was to present as much information as possible on one screen in order to see party profiles, court activity, potential value, injuries, critical dates, status, and much more for multiple cases... all in a simple and user-friendly format that doesn't confuse or intimidate your team. Having direct access to all of that information at your fingertips gives you confidence and makes your firm more efficient and more productive.

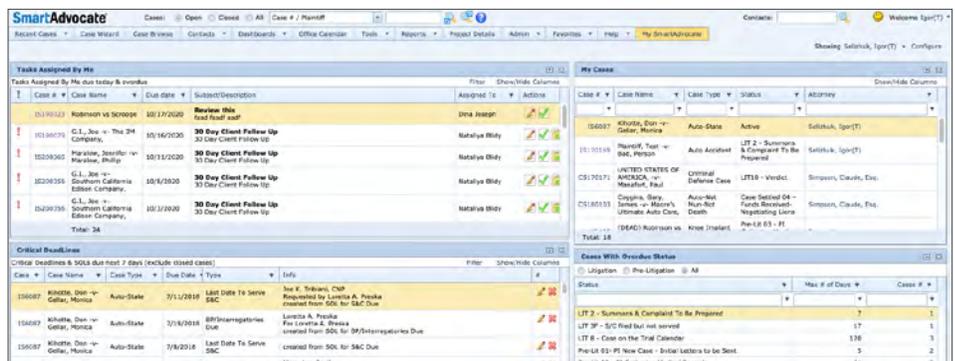
## Deployment Options

SmartAdvocate is designed for personal injury, mass tort, and other litigation practices such as Social Security disability and workers' compensation. Firms of all sizes can take advantage of SmartAdvocate including solo practitioners.

SmartAdvocate is available in both cloud and server-based versions. If you have the resources and prefer to maintain the software on your own server, you can choose the [SmartAdvocate Server](#) option. All of your backups and maintenance can be handled by you and your IT personnel.

If you are keen to rely on the ease and affordability of the cloud, you can avoid the trouble and expense of purchasing and maintaining a server by using [SmartAdvocate Cloud](#).

Regardless of how you choose to host SmartAdvocate (Server or Cloud), individual users access the platform via a web browser (for example, Google Chrome or Microsoft Edge). Both the Server and Cloud versions of SmartAdvocate are fully browser-based, which means your data is



**Figure 1:** Your dashboard in SmartAdvocate can display assigned tasks, upcoming calendar appointments, critical deadlines, and a list of your cases. Click the Configure menu in the upper right-hand corner to choose which panels to display, resize them, and arrange them as needed in the browser window.

“ SmartAdvocate is customized for personal injury, mass tort, and other litigation practices such as Social Security disability and workers’ compensation.”

“ SmartAdvocate includes a full-featured document management system and includes an add-in for Microsoft Word in order to create templates for document assembly.”

available anywhere you have an Internet connection. That includes your mobile devices with the use of the SmartAdvocate app which is compatible with both iOS and Android devices.

### A Comprehensive Dashboard

Upon logging in to SmartAdvocate, you land on a personalized and customizable dashboard that lays out your assigned tasks, calendar dates, and other critical data so you can see everything you need. See Figure 1 on the previous page.

You can filter information and choose the columns you need to display. Helpfully, SmartAdvocate remembers the last view of a dashboard or panel when you exit and return. With a right-click, you can perform work on any item in a dashboard or list view such as setting or canceling a calendar item, creating a case task, or marking a task complete.

### Search For Your Matter

Click a matter from a dashboard view of your most recent cases or use the handy search box atop every browser window to search by the case number or plaintiff’s name.

The quick-search box also allows you to search text and numbers with wildcards in selected fields such as a claim number, incident date, court docket or index number, a client’s birthdate, email address, and Social Security or telephone number.

From the search results list, you can right-click on any case to add an appointment, note, task, telephone number, or message and you can send an email or text. You can easily update a case without

derailing your current focus. Select a matter to open it for a comprehensive view of all the relevant case information. See Figure 2.

### Critical Case Information

If a case includes a critical note, a pop-up window displays that information—such as “don’t speak to the husband.” With one click, you can create a note, telephone message, appointment, task, or email. You’re even able to start a timer for billing purposes to track the hours on a case.

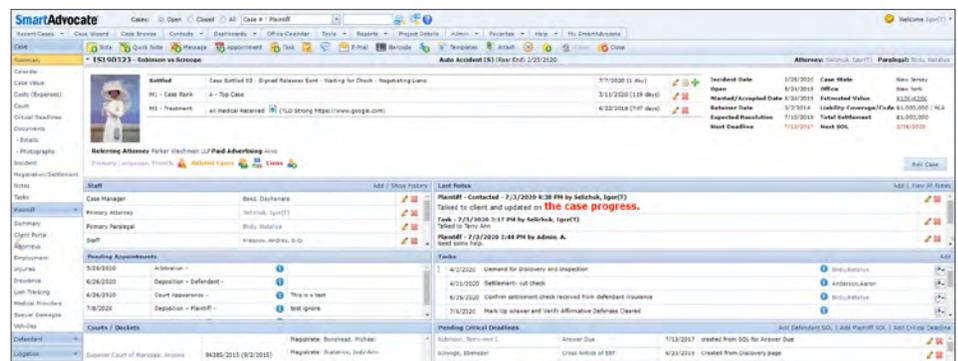
Along the left side of the case’s Summary Screen is a detailed list of customizable menu items that allow the user to quickly navigate to specific pages in the case. The **matter calendar** synchronizes with Microsoft Outlook.

### Delightful Document Management

SmartAdvocate has a full-featured Document Management System (DMS). You can view detailed, columnar metadata on case documents from a list view. See Figure 3 on the next page.

There are numerous ways to get documents into the DMS. SmartAdvocate includes an add-in for Microsoft Word to **create templates** for document assembly. You can easily embed any database field in the system in a document template. Once you’ve generated a document from a template using a client’s directory information and case facts, it’s automatically saved in the SmartAdvocate DMS.

Simply drag-and-drop files from your desktop and scan documents with barcodes directly into the DMS for easy document transfer and tracking.



**Figure 2:** The SmartAdvocate case view includes the case number and type at the top plus a summary of critical data including the next deadline and applicable statute of limitations. Detailed information in panels list the staff working on the matter, pending appointments, plaintiffs, critical deadlines, notes, tasks, and court and docket information. Add a panel item from the upper right-hand corner and edit or delete an item from its list view.

SmartAdvocate automatically files emails sent from the system which integrates with any SMTP mail server such as Microsoft Office 365, Exchange Server, or Gmail. SmartAdvocate also supports email templates that assemble standard text with client and case data. SmartAdvocate has a Microsoft Outlook add-in to save messages and selected attachments in either the DMS or the case note section.

### Tracking Leads and Setting Up Cases

Case intake is done seamlessly in SmartAdvocate with a Case Wizard. The wizard prompts you to get answers to required and conditional questions from a lead, track referrals and marketing campaigns, and calculate statutes of limitations. It allows you to manage leads like cases but with special functions to follow

up with leads after intake and sending documents such as client retainers. SmartAdvocate supports electronic signatures powered by **AssureSign**.

There's also a knowledge base of mass tort case features that attorneys and staff can use to learn about the status of a case at the firm and its intake issues and updates.

### Powerful Reports

**SmartAdvocate** supports searchable timelines of all case activity and full-featured SQL reporting. It also includes plenty of standard reports that are essential to a firm's litigation services. *See Figure 4.*

The SmartAdvocate Case Browser feature allows you to create custom reports based on hundreds of criteria and have those

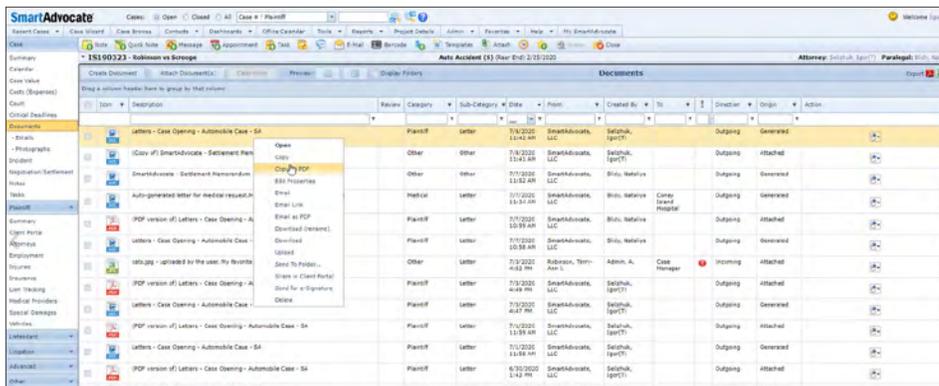
reports automatically emailed to you or someone at the firm. You also have the flexibility to create custom reports based on your specific needs.

### Security and Accounting

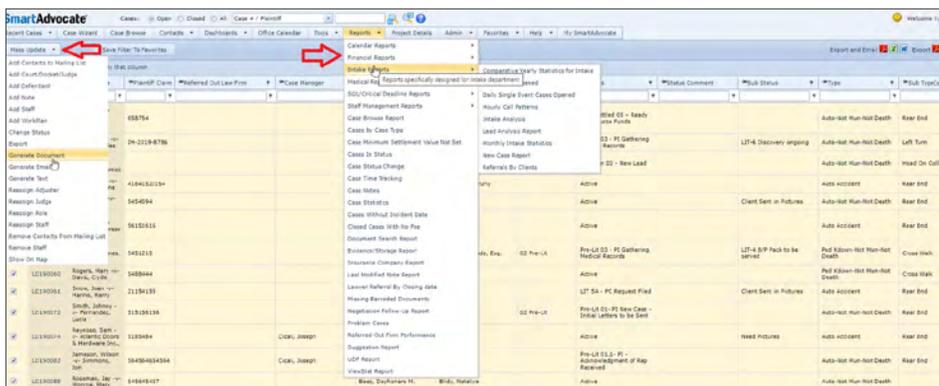
SmartAdvocate supports customizable permissions to access content based on roles and cases. It includes automated procedures and work plans to design case management and a time tracking function to create billable invoices. SmartAdvocate integrates with **QuickBooks** Desktop where you can push case costs and expenses for reporting, analysis, and billing. Integration with online QuickBooks is being released in a few months.

### Who is SmartAdvocate?

**SmartAdvocate**, based in Port Washington, New York with an office in Bonita Springs, Florida, develops and distributes the eponymous personal injury case management software. Jerry S. Parker, of **Parker Waichman**, developed the software when he found no other product offering suitable features for plaintiff-side PI and mass tort law firms in addition to other firms with a litigation practice. Solo practitioners and law firms of all sizes throughout the US, Australia, and Canada use SmartAdvocate.



**Figure 3:** SmartAdvocate's DMS makes it easy to find relevant case documents by filtering columnar data, such as category and subcategory, and searching text in document descriptions. Right-click a file in a list view to edit, send via email, convert to PDF, or take other actions.



**Figure 4:** SmartAdvocate's Case Browse function reports on cases and performs mass operations on search results by using the Mass Update feature displayed on the left. Pull down the reports tab on the right and select from numerous standard reports that you can set to be emailed to you on a schedule you select.

### Why Should You Consider SmartAdvocate?

- Browser-based case management with accessibility from virtually anywhere (Server or Cloud).
- Easily create templates from the documents that your firm already uses with over 2,500 merge codes available.
- Keep track of critical case information as well as vital firm financial and operational details with dozens of dashboards and reports that can even be automatically emailed to you.
- Provide clients with instant access to their case information including documents, the case calendar, notes, and more with the SmartAdvocate Client Portal which frees up staff time for other responsibilities.

### Try SmartAdvocate Today!

Contact us today to bring the benefits of SmartAdvocate into your firm.

Call: **1-877-GET-SMART**

Connect: [www.smartadvocate.com](http://www.smartadvocate.com)

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