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PRACTICE MANAGEMENT
BUYER'S GUIDE: 2022 EDITION

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

Company Name Brand
SmartAdvocate LLC

Product Name Brand
SmartAdvocate

Annual Release Updates
- A new user interface (UI) supports fresh fonts, icons, and themes akin to MacOS and Office 365.
- Full-text search integrates with dtSearch.
- Dashboards and Reports are now fully customizable.
- Upgraded automation features add new triggers and actions, enhancing workflows.
- Share documents stored in SmartAdvocate with external users and log in with two-factor authentication.
- See latest updates.

Raising Efficiency and Productivity
Wouldn't it be nice to use legal software designed by lawyers? If you're a personal injury or mass tort attorney, you need to look at SmartAdvocate. A plaintiff's

attorney developed it to provide reliable and comprehensive information on all aspects of a large number of cases.

SmartAdvocate aims to present as much information as possible, all on one screen. 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 you or your team. Having access to all that information at your fingertips instills confidence and makes your firm more efficient and productive.

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

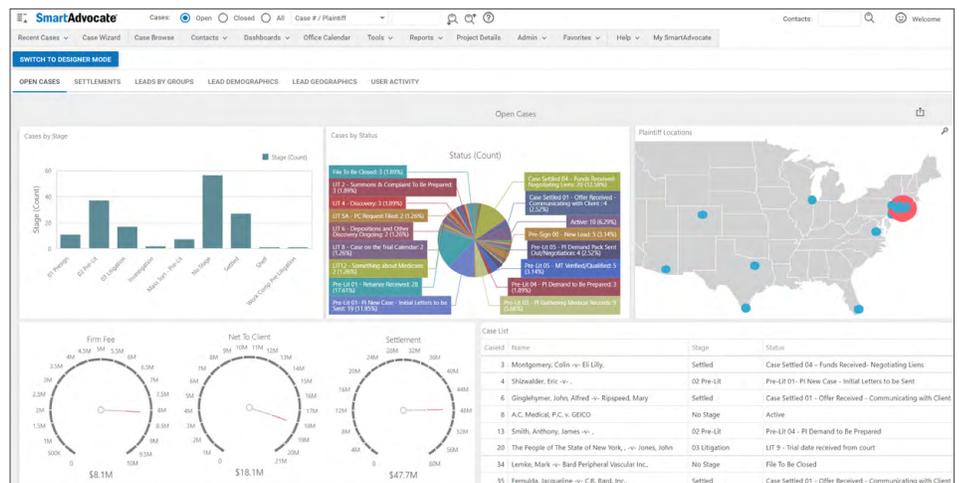SmartAdvocate is available in both cloud (SmartAdvocate Cloud) and server-based

Figure 1: Your SmartAdvocate homepage can display assigned tasks, upcoming calendar appointments, critical deadlines, case lists, and customized dashboards. Click the Designer Mode button in the upper left-hand corner to choose which panels to display and resize and arrange panels as needed in the browser window.

> **"** SmartAdvocate's new release has the capability to create completely custom dashboards. The Dashboard Designer allows users to build all types of dashboards with charts, graphs, and maps based on any data in the SmartAdvocate database, which translates into extensive reporting that fits any firm's needs."

> **"** One of SmartAdvocate's latest updates is an integration with a full-text search engine, dtSearch, which allows users to search the contents of text documents, including PDFs that are OCRed."

(SmartAdvocate Server) versions. Regardless of how you choose to host the software, individual users access the platform via a web browser, such as Google Chrome or Microsoft Edge, which means your data is available anywhere you have an Internet connection. That includes mobile devices using the SmartAdvocate app, compatible with iOS and Android devices.

Powerful Dashboards
Upon logging in to SmartAdvocate, you land on a personalized home page with customizable dashboards and lists of assigned tasks, calendar dates, and other critical data to see everything you need.

With a right-click, you can 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. You can filter information and choose the columns you need to display. SmartAdvocate remembers the last view of a dashboard or panel when you exit and return, regardless of the last device used. *See Figure 1 on the previous page*.

SmartAdvocate supports searchable timelines of all case activity and full-featured SQL reporting. It also includes plenty of standard dashboards essential to a firm's litigation services.

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data in the SmartAdvocate database, which translates into extensive reporting that fits any firm's needs.

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 case number or plaintiff's name. SmartAdvocate now supports a full-text search integration with dtSearch.

The quick-search box allows you to search text and numbers with wildcards in selected fields. Examples include 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. Quickly update a case without derailing your current focus. Select a matter to open it for a comprehensive view of all 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." You can create a note, telephone message, appointment, task, or email with one click. 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
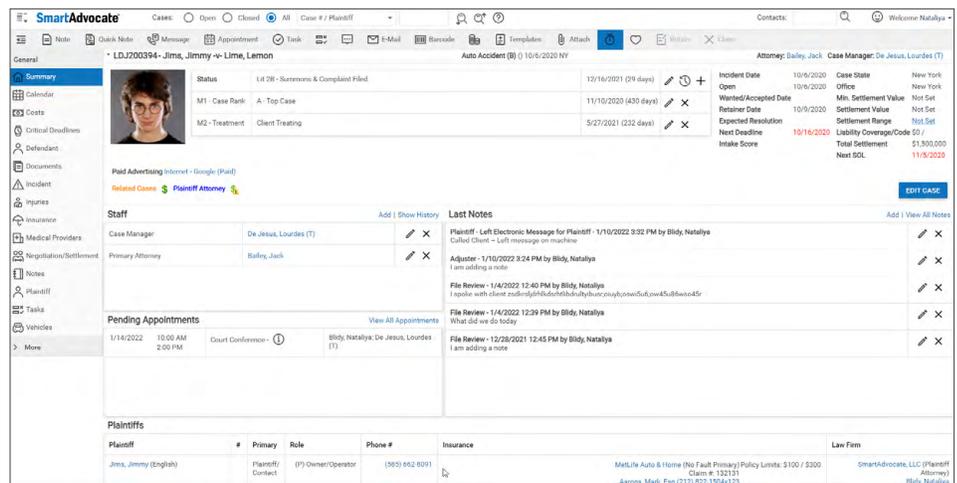

Figure 2: This SmartAdvocate view includes a summary of critical data, including the next deadline and applicable statute of limitations. Detailed information in panels lists the staff working on the matter, pending appointments, plaintiffs, critical deadlines, notes, tasks, and court and docket information.

menu items that allow the user to quickly navigate to specific pages in the case. The matter calendar even synchronizes with Microsoft Outlook. *See Figure 3.*

Delightful Document Management

SmartAdvocate includes a full-featured Document Management System (DMS). You can view detailed, columnar metadata on case documents from a list view.

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 is automatically saved in the SmartAdvocate DMS. Drag and drop files from your desktop and scan documents with barcodes directly into the DMS for easy document transfer and tracking.

One of SmartAdvocate's latest updates is an integration with a full-text search engine, dtSearch, which allows users to search the contents of text documents, including PDFs that are OCRed. 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 the New 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 send documents such as a client retainer. SmartAdvocate supports electronic signatures powered by AssureSign and DocuSign.

Security and Integrations

SmartAdvocate supports customizable role-based permissions to access content. It includes automated procedures and work plans to design case management and a time-tracking function to create billable invoices. SmartAdvocate now integrates with online QuickBooks as well as Desktop, where you can push case costs and expenses for reporting, analysis, and billing.

Other integrations include CalendarRules, Message Media, National Record Retrieval, and RingCentral.

Who is SmartAdvocate?

SmartAdvocate, based in Melville, New York, with an office in Bonita Springs, Florida, develops and distributes the eponymous personal injury (PI) 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.

Why Should You Consider SmartAdvocate?

- Browser-based case management with accessibility from virtually anywhere (server or cloud).
- Easily create document and email 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 automatically be 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 or connect at www.smartadvocate.com
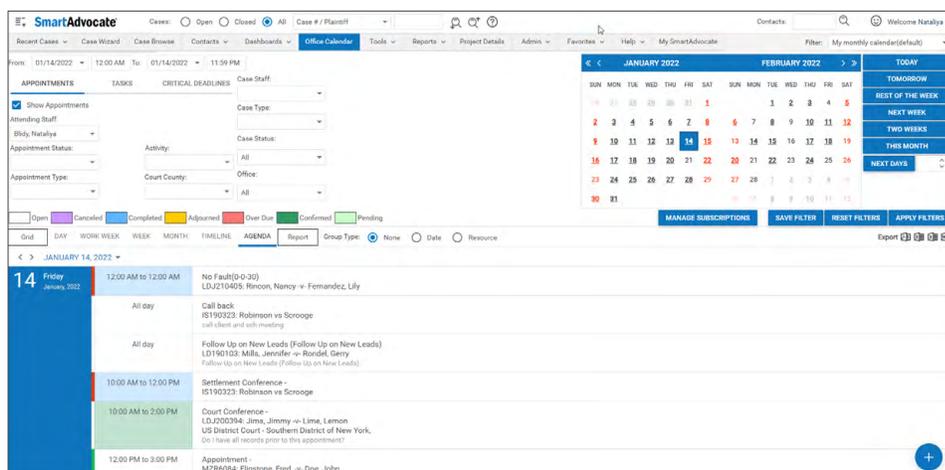

Figure 3: The SmartAdvocate Office Calendar, as well as the calendar reports provided, can display events for a single case, an individual, any group or department, or the entire office. Appointments, critical deadlines, and SOLs can be pushed to your Outlook calendar.

Thank you for reading,
let's keep in touch!

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