

CaseWORTH 2.0 New Features

20070927

CaseWORTH version 2.0 includes a number of client suggestions and requests. We also added some of our own ideas to make the product even more useful. The big news is we finally added the most requested feature since the original release of the product two years ago.

CaseWORTH has always allowed you to attach *scanned medical bills* and easily print a Medical Treatment Timeline report. With CaseWORTH 2 you may also attach *scanned medical records* to your Medical Service Dates. We take this further by adding a new Medical Treatment Notes dialog where you can enter four separate note or memo areas:

- Sanitized Treatment Summary (to share with opposing party)
- Attorney Notes
- Staff Notes
- Expert/Nurse Practitioner Notes

Treatment Notes for Johnson Radiology Clinic on 9/27/2007

Treated by: Dr. Bill Morgan

CPT Code(s):

ICD-9 Code(s):

Specify actual treating physician or staff.

Scanned Medical Record(s)

Existing Files: Johnson Radiology MedRec.tif

Section:

Page: 7

Attach Scanned File View File Remove Attached File

Sanitized Treatment Summary (May share with opposing party) **Attorney Notes** **Staff Notes** **Expert/Nurse Practitioner Notes**

Patient received CT scan of upper torso. Found abnormality in C3 vertebrae.

Attach and View scanned medical records with optional page number and section.

Each notes section is separate and may be optionally included in the Medical Treatment Summary report.

An Expert/Nurse Practitioner may enter their analysis directly into your CaseWORTH file. Their notes may be combined with your own to build a work product that changes as the discovery changes.

NOTE: Tab names that contain information display in blue and bold so you know what information is available at a glance.

Save & Close Save & Continue Editing Cancel Delete this Entire Entry Video Help

Each of the four note sections is separate and you have the option to individually include any one, or all of them in the Medical Treatment Summary report. This report is like the Medical Treatment Timeline, but may include additional information like the treating physician, CPT codes, ICD-9 codes and references to the actual medical records page that supports your note entries. Continue to edit the notes as you uncover more information about your client's treatment and the chronological report will automatically be updated.

This new Medical Treatment Summary report will be invaluable in depositions, to share with the opposing part and for use at trial.

Medical Expenses Report				Smart, Quick & Goode Law Firm
Claimant: Ronald Smith				Attorney: D.M. Goode
Service Date 09/27/2007	Medical Provider ABC Ambulance Service	Description Stabilize & emergency transport	Billed 685.00	
Treated By		CPT Codes	ICD-9 Codes	
Scanned Med Record:		Section:	Page # 0	
Treatment Summary Pt is 34 y/o male c/o neckpain following multiple car mva on 9/27. PT was transp to closest hosp for emergenvy evaluation and treatment.				
Attorney Notes				
Staff Notes				
Expert/Nurse Practitioner Notes				
Service Date 09/27/2007	Medical Provider Johnson Radiology Clinic	Description MRI scan of head and neck	Billed 861.32	
Treated By Dr. Bill Morgan		CPT Codes	ICD-9 Codes	
Scanned Med Record: Johnson Radiology Med Rectif		Section:	Page # 7	
Treatment Summary Patient received MRI scan of head and neck. Found hairline fracture in C3 vertebrae. Pt also has disalignment in C4-C5 region.				
Attorney Notes Check Dr. Morgan's background. Client was supposed to be working with Dr. Johnson.				
Staff Notes				
Expert/Nurse Practitioner Notes				
Fracture of C3 appears to be a new injury as a result of mva on 9/27. However, disalignment of C4-C5 region appears to be from				
Confidential & Privileged				
Print Date: 9/28/2007		CaseWORTH Licensed for the exclusive use of Smart, Quick, & Goode Law Firm		
		Page 1 of 2		

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Smart, Quick & Goode Law Firm

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Other changes in version 2.0:

- **Control Service Date Sort order.** The new Medical Treatment Summary report must be in chronological order even when the client saw more than one doctor in a single day. The new <Service Date Sort> button shows all Service Dates in chronological order and allows you to change the order of any that fall on the same day. This allows you to control the reported flow of your client's medical care.
- **Medical Statement Date field is now optional.** The Statement Date field on the Medical Expenses tab allows you to document the actual billing dates for the services performed by each Medical Provider. Some CaseWORTH users only care about the Service Dates and don't want to enter the Statement Date or have it confusing the reports. CaseWORTH v2 gives you the option to turn the Statement Date field on or off on a case by case basis.
- **Specify Statement page numbers.** You may now track the specific page number on a scanned medical bill from each Service Date line. This helps you easily find the supporting information from the bill for a specific Service Date entry.
- **Service Dates may now be entered as Start Date – End Date range.** When your client has a hospital stay or prolonged treatment you may now enter a starting and ending date for each Service Date row.

- **Optionally include Firm Expenses in the Damage Summary totals.** Some of our users asked to have the Firm Expenses removed from the totals on the Damage Summary tab and report. You now have the option to see total damages with or without Firm Expenses.
- **Set and save Attorney Name for a case file.** CaseWORTH v2 allows you to specify the lead attorney for a case file. You can change this attorney name later if required. The attorney you specify will be saved so you won't be asked each time you print a report.
- **Automatic Timed Saves of your CaseWORTH data file.** Specify how often you want CaseWORTH to automatically save your file.
- **Automatic multiple revision backups of your CaseWORTH file.** CaseWORTH v2 can save as many recent versions of your CaseWORTH file as you require. When you open a CaseWORTH file and enter new data your old version will be time stamped and saved. You can keep the last 5, 10, 20 or more of these versions. You decide how many versions to keep. You can go back and view or revert to a previous version if you ever need to rollback. *NOTE: This is not a substitute for backing up your CaseWORTH client files. If your hard drive crashes, the current file and all older revisions may still be lost. Please make sure you have a reliable backup procedure in place for your CaseWORTH data and all other client files*
- **File save prompts only when needed.** The old version of CaseWORTH asked you to save your file even if you just saved it. CaseWORTH v2 knows when you have entered new information and won't ask you to save unless you need to.
- **Automatic file save request when you start a new case file.** Just like with a Word document, you can open a new CaseWORTH file, enter a bunch of data and lose your work if the power goes off. CaseWORTH v2 now asks you to name your file and save it in the client's folder as soon as you enter information in a new file. This along with the new Timed Save feature will help protect your time and effort.
- **Automatically Create Portable Electronic Case File with Financials and all scanned documents.** CaseWORTH can be set to move or copy scanned documents to the client's CaseWORTH folder. This makes it easier to use CaseWORTH with a networked office copier/scanner to build a portable electronic case file. The client folder can be copied to laptop, CD, USB drive or zipped and emailed. The copy will include all of the financial details and the attached scanned documents and may be viewed on any PC with a CaseWORTH license.