

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Claimant Name: Ronald Smith
Claimant Address 1: 127 S. Lawrence St
Claimant Address 2:
Claimant City: Cabot
Claimant State: AR
Claimant Zip: 72023
Claimant Home Phone: 501.555.8767
Claimant Work Phone:
Claimant Cell Phone:
Claimant Fax:
Claimant Pager:
Claimant E-Mail Address:
Claimant SSN: 432-88-1234
Claimant Gender: M
Claimant Race: W
Claimant Date of Birth: 3/16/1963

Memo:

Print Video Help

Track basic claimant information with this customizable list of fields.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Case Name: Ronald Smith vs. Rogers & Johnson Trucking and Bill Planter
Court Case/Docket Number: CV-20051827
Firm File Number: 05-1267
Plaintiff: Ronald Smith
Defendant: Rogers & Johnson Trucking, Bill Planter
Court/Division:
Judge: The Honorable James Watson
Incident Date: 2/7/2004
Statute of Limitations Date:
Case Opening Date: 5/12/2004
Settlement Date:
Final Settlement:
Number of Insurance Companies involved: 1
Number of Opposing Law Firms involved: 0

Memo:

Accident Type: Traffic accident, Rear ended by a Semi on I-440 outside Little Rock, AR.

Injuries Include: bilateral femur fractures, hip and ankle fractures, concussion, and fracture of the C2 vertebrae.

Treatment/Services: Patient was transported by ambulance from scene to St. John's ER where he was stabilized and placed in a halo for C2,3 stabilization. Orthopedic surgery was performed for femur fractures, hip and ankle fractures. Following ICU and floor recovery time, patient was transported to Jenkins Rehabilitation Center for in house rehab services (duration 15 days). Patient then followed up with renowned spinal surgeon Dr. Charles Peek in Memphis, TN. Dr. Peek performed stabilization/fusion surgery on vertebrae C2 and C3. Following this surgery and in house recovery time, patient was transported to

Print Video Help

Track basic case information with this customizable list of fields.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Total Billed by all Medical Providers		\$56,068.69
Total Paid to all Medical Providers		(\$41,436.55)
Total Due to all Medical Providers		\$10,200.62

Medical Provider	Interest	Liens	Nego \$	Provider Description	Total Billed	Total Paid	Total Due
Dr. Don Brown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orthopedic Surgeon	\$3,730.00	(\$2,996.97)	\$733.03
Dr. Charles Peek	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Spinal Surgeon	\$7,745.00	(\$6,412.00)	\$1,333.00

Statement Date	Stmnt #	Statement Description	Stmnt	Billed	Paid	Due
5/22/2004	8856490			\$7,745.00	(\$6,412.00)	\$1,333.00

Service Date	End Date	Service Type	Service Description	Page	Amount Billed	Trip	MedRec/Notes
3/2/2004	3/2/2004	Diagnostic	Pre-Op Consultation		\$85.00		
3/3/2004	3/3/2004	Treatment	Stabilization/fusion surgery on	Pg 3	\$7,490.00		

Treatment Notes: 3/3/2004 'Stabilization/fusion surgery on vertebrae C2 and C3' - Dr. Charles Peek

Treated by: Dr. Bill Morgan

Scanned Medical Record(s)

Existing Files: Ron Smith - MRI Brain Scan 1.jpg Page: 1

Section:

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 MRI scan of head and neck. Found hairline fracture in C3 vertebrae. Pt also has disalignment in C4-C5 region.

Date Video Help

Attach scanned medical records and your notes directly to the Service Date in the Medical Expense history.

Enter notes in 4 separate categories and choose which to include in the automatic Medical Treatment Chronology report.

Save & Close

Save & Continue Editing

Cancel

Delete this Entire Entry

Video Help

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info **Medical Expense \$56,068.69** Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 Future Earning \$519,852.12 Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

Total Billed by all Medical Providers		\$56,068.69
Total Paid to all Medical Providers		(\$41,436.55)
Total Due to all Medical Providers		\$10,200.62

Medical Provider	Interest	Liens	Nego \$	Provider Description	Total Billed	Total Paid	Total Due
Dr. Don Brown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Orthopedic Surgeon	\$3,730.00	(\$2,996.97)	\$733.03
Dr. Charles Peek	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Spinal Surgeon	\$7,745.00	(\$6,412.00)	\$1,333.00

Statement Date	Strmt #	Statement Description	Strmt	Billed	Paid	Due
5/22/2004	8856490			\$7,745.00	(\$6,412.00)	\$1,333.00

Service Date	End Date	Service Type	Service Description	Page	Amount Billed	Trip	MedRec/Notes
3/2/2004	3/2/2004	Diagnostic	Pre-Op Consultation		\$85.00		
3/3/2004	3/3/2004	Treatment	Stabilization/fusion surgery on	Pg 3	\$7,490.00		
3/17/2004	3/17/2004	Treatment	Post-Op visit 2 Wks		\$85.00		
4/14/2004	4/14/2004	Treatment	Post-Op visit 6 Wks		\$85.00	Trip 2	

Unassigned dollar amount remaining on this statement: \$0.00

Payment Date	Subro Source	Remittance #	Payment Description	Adj	Amount Paid	View
6/15/2004	BSMS Insurance	44355		<input type="checkbox"/>	(\$6,142.00)	
6/15/2004	BSMS Insurance	44355		<input checked="" type="checkbox"/>	(\$270.00)	

Medical Provider	Interest	Liens	Nego \$	Provider Description	Total Billed	Total Paid	Total Due
Griffin Anesthesiologist	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anesthesiologist	\$1,284.90	(\$1,027.92)	\$256.98
Jenkins Rehabilitation Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rehab	\$3,375.00	(\$0.00)	\$3,375.00
Negotiation Date: 2/4/2008				Contact: Sue Brown	Staff: LAG	50%	\$1,687.50
Johnson Radiology Clinic	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Radiology	\$450.00	(\$360.00)	\$90.00
Lawrence Christopher - St. John's	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Hospital	\$21,084.96	(\$17,205.33)	\$3,879.63

Total Coverage Limits: 125000 The total Medical Expenses (\$56,068.69) are 44% of the Total Coverage Limits.

Expand All Collapse All Edit Medical Providers Service Date Sort Print Use Statement Date Video Help

See totals billed, paid and due for each Medical Provider and all providers combined.

Enter basic or detailed statement amounts and optionally attach scanned statements.

Optionally enter individual dates of service to create a Medical Treatment Timeline report.

Enter your own Medical Treatment Notes & even attach scanned medical records, then print a detailed Medical Treatment Chronology.

Enter Subrogation payments & Adjustments from any source to impact the amount due to each Medical Provider.

Enter firm negotiations with Medical Providers on the client's behalf. The adjusted amounts will impact the total plus, a note will be added the client's Settlement Statement highlighting your effort.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info |
 Case Info |
 Medical Expense \$56,068.69 |
 Subro Payments \$41,436.55 |
 Future Medical \$31,021.57

Past Earning \$18,116.64 |
 Future Earning \$519,852.12 |
 Travel \$735.33 |
 Burial \$19,870.45 |
 Other \$28,371.12

Firm Expenses \$1,640.72 |
 Exp/Liens Due \$35,230.61 |
 Damage Summary |
 Math Worksheet |
 Settlement Calculator

Total Subro Payments and Adjustments:		(\$41,436.55)	
Adjustments to Medical Provider Statements:		(\$4,078.35)	
Total Paid by all Subro Sources (not including Adjustments):		(\$37,358.20)	

Subrogation Source	Interest	Nego \$	Subro Source Description	Total Paid
Claimant	<input type="checkbox"/>	<input type="checkbox"/>		(\$0.00)
BSMS Insurance	<input type="checkbox"/>	<input type="checkbox"/>	Private Health Ins	(\$37,358.20)

Track Subrogation Payments and Adjustments made by any insurance company, Workers Comp, Medicare or Social Security. The basic or detailed values entered are used to automatically calculate the amount due to each Medical Provider. Enter Cost of Collection details for Subro Sources and the amounts will be applied to the Settlement Calculator and Statement.

Adjustments:

Adjustments to Medical Provider Statements:						(\$4,078.35)
Remittance Date	Remittance #	Subro Source	Remittance Description	Add/View	Amount Paid	
4/22/2005	558497	BSMS Insurance			(\$1,153.92)	
4/22/2005	5587	BSMS Insurance			(\$18.32)	
4/22/2005	67448	BSMS Insurance			(\$113.07)	
4/22/2005	224332	BSMS Insurance			(\$80.00)	
4/22/2005	44355	BSMS Insurance			(\$270.00)	
4/22/2005	1222758	BSMS Insurance			(\$643.17)	
4/22/2005	7765	BSMS Insurance			(\$113.07)	

Expand All |
 Collapse All |
 Edit Subro Source |
 Print |
 Video Help

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Total Lost Past Earnings:						\$18,116.64	
Income Source (Job, etc)	Source Description					Total Income	
<input checked="" type="checkbox"/>	Common Bank & Trust					Mr. Smith's Primary Employer	\$17,538.14
<input checked="" type="checkbox"/>	Start Date	End Date	Type	Lost Income Description	Add/View	Amount	
<input checked="" type="checkbox"/>	2/9/2004	7/2/2004	Weekly			\$17,038.14	
	Amount per Week:		\$811.34	Number of missed Weeks:	21		
<input checked="" type="checkbox"/>	7/2/2004	7/20/2004	Lump Sum			\$500.00	
<input checked="" type="checkbox"/>	WalMart					Greeter as a part time job	\$578.50
<input checked="" type="checkbox"/>	Start Date	End Date	Type	Lost Income Description	Add/View	Amount	
<input checked="" type="checkbox"/>	6/1/2005	7/2/2005	Hourly			\$578.50	
	Amount per Hour:		\$6.50	Number of missed Hours:	89		

CaseWORTH tracks simple or detailed lost Past Earnings from one or more Income Sources. Build a history as the client is forced to miss work or come and go from their job.

Expand All
Collapse All
Print
Video Help

Project Future Earnings from one or more income sources and CaseWORTH will automatically reduce them to present value based on an interest rate you select. Let the adjuster wonder if you actually hired an economist for first round negotiations.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info **Medical Expense \$56,068.69** Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 **Future Earning \$519,852.12** Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

Actual Future Earnings:		\$754,450.83			
Present Value (PV) of Future Earnings:		\$519,852.12			
Income Source (Job, etc)	Source Description	FE Total	PV Total		
Common Bank & Trust	Can return to work 1/2 time because he can't sit in a	\$754,450.83	\$519,852.12		
Start Year	Type	Lost Income Description	Add/View	FE Amount	PV Amount
2004	Lump Sum	Work 50% of last 5 months of 2004.		\$8,789.50	\$9,892.66
2005	Yearly	With an annual salary of \$42,189.68		\$745,661.33	\$509,959.46
Amount per Year \$21,094.		Number of missed Years 23	Cost of Living% 3%	COL Periods 11	
Raise (+/-) % 2%		Raise % Periods 23	Raise (+/-) \$ \$0.00	Raise\$ Periods 0	
1 (2006)	Base: \$21,094.84	COL%: \$0.00	Raise%: \$421.90	Raise\$: \$0.00	FE\$: \$21,516.74 PV\$: \$20,890.04
2 (2007)	Base: \$21,516.74	COL%: \$645.50	Raise%: \$430.33	Raise\$: \$0.00	FE\$: \$22,592.57 PV\$: \$21,295.66
3 (2008)	Base: \$22,592.57	COL%: \$0.00	Raise%: \$451.85	Raise\$: \$0.00	FE\$: \$23,044.42 PV\$: \$21,088.91
4 (2009)	Base: \$23,044.42	COL%: \$691.33	Raise%: \$460.89	Raise\$: \$0.00	FE\$: \$24,196.64 PV\$: \$21,498.40
5 (2010)	Base: \$24,196.64	COL%: \$0.00	Raise%: \$483.93	Raise\$: \$0.00	FE\$: \$24,680.57 PV\$: \$21,289.68
6 (2011)	Base: \$24,680.57	COL%: \$740.42	Raise%: \$493.61	Raise\$: \$0.00	FE\$: \$25,914.60 PV\$: \$21,703.07
7 (2012)	Base: \$25,914.60	COL%: \$0.00	Raise%: \$518.29	Raise\$: \$0.00	FE\$: \$26,432.89 PV\$: \$21,492.36
8 (2013)	Base: \$26,432.89	COL%: \$792.99	Raise%: \$528.66	Raise\$: \$0.00	FE\$: \$27,754.54 PV\$: \$21,909.69
9 (2014)	Base: \$27,754.54	COL%: \$0.00	Raise%: \$555.09	Raise\$: \$0.00	FE\$: \$28,309.63 PV\$: \$21,696.97
10 (2015)	Base: \$28,309.63	COL%: \$849.29	Raise%: \$566.19	Raise\$: \$0.00	FE\$: \$29,725.11 PV\$: \$22,118.27

Life Expectancy Info Current Age: 42 Remaining Years: 37.31 Year: 2045

Work Expectancy Info Retirement Age: 65 Years to Retirement: 23 Year: 2031

PV Discount Interest Rate: 3% Actuary Table: Arkansas Forms Book - Unisex

Expand All Collapse All Actuary Info Print Video Help

Enter a few simple amounts based on the client's earning history. Back them up with tax documents & employer testimony.

CaseWORTH builds an amortization style report showing actual earnings for each year and the amount when reduced to present value.

You choose and adjust the interest rate to instantly see updated Present Value.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info **Medical Expense \$56,068.69** Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 **Future Earning \$519,852.12** Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

Actuary Information

Actuary Table Name: South Carolina - Male [SC ST SEC 19-1-150]

Source: SC Code Ann. Section 19-1-150

Source Publication Date: 1/1/2007

CaseWORTH Publication Date: 8/23/2007

Info:
SECTION 19-1-150. Life expectancy tables. [SC ST SEC 19-1-150]
When necessary, in a civil action or other litigation, to establish the life expectancy of a person from any period in his life, whether he is living at the time or not, the table below must be received in all courts and by all persons having power to determine litigation as evidence, along with other evidence as to his health, constitution, and habits, of the life expectancy of the person. In determining the age of a person as of any particular time, periods of six months or more beyond the last full year must be

Current Age	Years Remaining
0	76.62
1	75.69
2	74.74
3	73.76
4	72.78
5	71.8
6	70.81
7	69.83
8	68.84
9	67.86
10	66.88
11	65.89
12	64.91
13	63.93
14	62.95
15	61.98
16	61.02
17	60.07
18	59.12

Close

Life Expectancy Info	Current Age:	42	Remaining Years:	36.46	Year:	2044
Work Expectancy Info	Retirement Age:	65	Years to Retirement:	23	Year:	2031
PV Discount Interest Rate:		3%		Actuary Table: South Carolina - Male [SC ST SEC 19-1-150]		

Expand All Collapse All **Actuary Info** Print Video Help

For states where life expectancy is defined in statute, CaseWORTH can include the claimant's remaining years in the future reports.

(NOTE: We are adding new actuary tables all the time. If you use one we don't currently have, we would be happy to add it to CaseWORTH for you.)

Project Future Medical Expenses based on one or more future requirements and CaseWORTH will automatically reduce them to present value based on an interest rate you select. Let the adjuster wonder if you actually hired an economist for first round negotiations.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info Medical Expense \$56,068.69 Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 Future Earning \$519,852.12 Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

Actual Future Medical Expense (FME):		\$42,249.08								
Present Value (PV) of Future Medical Expense:		\$31,021.57								
Expert/Provider	Provider/Expert Description	FME Amount	PV Total							
Dr. Peek (Spinal Surgeon)	The Dr. that performed Mr. Smith's spinal operation	\$42,249.08	\$31,021.57							
Start Year	Type	Medical Expense Description	Add/View	FME Amount	PV Amount					
2004	Yearly	Mr. Smith will remain on medication		\$27,249.08	\$16,882.63					
Amount per Year		\$871.65	Number of missed Years	37						
Change (+/-) %		-5%	Change % Periods	7	Change (+/-) \$	\$0.00				
					Change\$ Periods	0				
1 (2005)	Base:	\$871.65	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$871.65	PV\$:	\$846.26
2 (2006)	Base:	\$871.65	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$871.65	PV\$:	\$821.61
3 (2007)	Base:	\$871.65	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$871.65	PV\$:	\$797.68
4 (2008)	Base:	\$871.65	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$871.65	PV\$:	\$774.45
5 (2009)	Base:	\$871.65	Change%:	(\$43.58)	Change\$:	\$0.00	FME\$:	\$828.07	PV\$:	\$714.30
6 (2010)	Base:	\$828.07	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$828.07	PV\$:	\$693.50
7 (2011)	Base:	\$828.07	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$828.07	PV\$:	\$673.30
8 (2012)	Base:	\$828.07	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$828.07	PV\$:	\$653.69
9 (2013)	Base:	\$828.07	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$828.07	PV\$:	\$634.65
10 (2014)	Base:	\$828.07	Change%:	(\$41.40)	Change\$:	\$0.00	FME\$:	\$786.67	PV\$:	\$585.36
11 (2015)	Base:	\$786.67	Change%:	\$0.00	Change\$:	\$0.00	FME\$:	\$786.67	PV\$:	\$568.31

Life Expectancy Info Current Age: 42 Remaining Years: 37.31 Year: 2045

Work Expectancy Info Retirement Age: 65 Years to Retirement: 23 Year: 2031

PV Discount Interest Rate: 3% Actuary Table: Arkansas Forms Book - Unisex

Expand All Collapse All Actuary Info Print video Help

Enter a few simple amounts based on medical record analysis and expert/medical provider testimony.

CaseWORTH builds an amortization style report showing actual expenses for each year and the amount when reduced to present value.

You choose and adjust the interest rate to instantly see updated Present Value.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Total Recoverable Law Firm Expenses: \$250.00
 Remaining Unpaid Expenses \$1,100.00
 Total Law Firm Expenses \$1,640.72

Firm Name	Firm Description	Total Expense
Smart, Quick & Goode Law Firm		\$0.00
Smith, Smith and Johnson	PI ATTY	\$1,640.72

Date	Expense Description	Payee	Paid	Recoverable	Add/View	Amount
4/4/2004	Postage for discovery	FedEx	<input checked="" type="checkbox"/>	<input type="checkbox"/>		\$71.54
4/11/2004	Copies of Discovery	Kinkos	<input checked="" type="checkbox"/>	<input type="checkbox"/>		\$117.48
4/26/2004	Postage	FedEx	<input checked="" type="checkbox"/>	<input type="checkbox"/>		\$21.35
5/7/2004	File Copies for Sam Robinson	Kinkos	<input checked="" type="checkbox"/>	<input type="checkbox"/>		\$63.21
5/10/2004	Expert Witness fee (Sam Robinson -	Sam Robinson	<input type="checkbox"/>	<input type="checkbox"/>		\$1,100.00
5/11/2004	Postage	FedEx	<input checked="" type="checkbox"/>	<input type="checkbox"/>		\$17.14
6/2/2004	Filing fees	Circuit Court	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		\$250.00

Track basic or detailed case expenses for your firm and multiple co-counsel firms separately. This total is carried to the Damage Summary tab.

(NOTE: You may print an expense report to PDF from your accounting system, enter the total and attach the PDF here. This makes the totals available to the Settlement Calculator and makes the details available on teh scanned report.)

Expand All
Collapse All
Law Firm Expenses by Payee
Print
Video Help

Law Firm Expenses by Payee

FedEx							\$110.03
Date	Expense Description	Law Firm	Paid	Recoverable	Add/View	Amount	
4/4/2004	Postage for discovery	Smith, Smith and	<input checked="" type="checkbox"/>			\$71.54	
4/26/2004	Postage	Smith, Smith and	<input checked="" type="checkbox"/>			\$21.35	
5/11/2004	Postage	Smith, Smith and	<input checked="" type="checkbox"/>			\$17.14	
Kinkos							\$180.69
Date	Expense Description	Law Firm	Paid	Recoverable	Add/View	Amount	
4/11/2004	Copies of Discovery	Smith, Smith and	<input checked="" type="checkbox"/>			\$117.48	
5/7/2004	File Copies for Sam Robinson	Smith, Smith and	<input checked="" type="checkbox"/>			\$63.21	
Sam Robinson							\$1,100.00
Date	Expense Description	Law Firm	Paid	Recoverable	Add/View	Amount	
5/10/2004	Expert Witness fee (Sam Robinson	Smith, Smith and	<input type="checkbox"/>			\$1,100.00	
Circuit Court							\$250.00
Date	Expense Description	Law Firm	Paid	Recoverable	Add/View	Amount	
6/2/2004	Filing fees	Smith, Smith and	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		\$250.00	

If you choose to track detailed Firm Expenses in CaseWORTH, you will be able to view/print a summary by Payee. Plus, your expense details will be included on the Settlement Statement for the claimant.

Ok Print Video Help

CaseWORTH

File Case Info

Claimant Info

Past Earning \$

Firm Expense

Total Recov

R

Firm Name

Smart, Qu

Smith, S

Date

4/4/200

4/11/20

4/26/20

5/7/200

5/10/20

5/11/20

6/2/200

Expand All Collapse All **Law Firm Expenses by Payee** Print Video Help

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info Medical Expense \$56,068.69 Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 Future Earning \$519,852.12 Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

Total Damages (Less Future): \$124,802.95
 Total Future Damages: \$550,873.69
 Total Damages (including Firm Expenses): \$675,676.64

Medical Expenses	Unassigned	Pharmaceutical	Diagnostic	Treatment	Total
Medical Provider	\$31,667.56	\$3,166.23	\$660.00	\$20,574.90	\$56,068.69
Dr. Don Brown	\$0.00	\$0.00	\$125.00	\$3,605.00	\$3,730.00
Dr. Charles Peek	\$0.00	\$0.00	\$85.00	\$7,660.00	\$7,745.00
Griffin Anesthesiology	\$100.00	\$1,184.90	\$0.00	\$0.00	\$1,284.90
Jenkins Rehabilitation Center	\$0.00	\$0.00	\$0.00	\$3,375.00	\$3,375.00
Johnson Radiology Clinic	\$0.00	\$0.00	\$450.00	\$0.00	\$450.00
Lawrence Christopher - St. John's	\$16,755.96	\$0.00	\$0.00	\$4,329.00	\$21,084.96
Tad's Pharmacy	\$0.00	\$696.43	\$0.00	\$0.00	\$696.43
UTMS Hospital	\$14,424.00	\$0.00	\$0.00	\$0.00	\$14,424.00
ABC Ambulance Service	\$387.60	\$0.00	\$0.00	\$585.90	\$973.50
Blackwell and Finch Physical Therapy	\$0.00	\$0.00	\$0.00	\$1,020.00	\$1,020.00
Douglas Anesthesiology	\$0.00	\$1,284.90	\$0.00	\$0.00	\$1,284.90
Past Earnings					Total
Income Source	Description				\$18,116.64
Travel Expenses					Total
					\$735.33
Firm Expenses (Recoverable)					Total
Law Firm	Description				\$1,640.72
Future Medical Expenses				Actual Total(FME)	Total(PV)
				\$31,021.57	\$31,021.57

Expand All Collapse All Print Check to include Firm Expenses Video Help

Grand totals are brought to the grey area at the top of each tab, with the most important totals always visible on each tab button.

Damage Summary shows quick, up to date totals for all damage and expense categories.

Grand total that must be paid to all Medical Providers & Subro Sources always visible on the button.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info Medical Expense \$56,068.69 Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 Future Earning \$519,852.12 Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 **Exp/Liens Due \$35,230.61** Damage Summary Math Worksheet Settlement Calculator

Total Due to all Medical Providers & Subro Sources: \$35,230.61

							Total Due to all Medical Providers:		\$10,200.62
Medical Provider	DO NOT Pay	Interest	Liens	Nego \$	Due Verified	Total Billed	Total Paid	Total Due	
Dr. Don Brown	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	\$3,730.00	\$2,996.97	\$733.03	
Dr. Charles Peek	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$7,745.00	\$6,412.00	\$1,333.00	
Griffin Anesthesiology	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	\$1,284.90	\$1,027.92	\$256.98	
Jenkins Rehabilitation	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$3,375.00	\$0.00	\$3,375.00	
Negotiation Date: 2/4/2008		Contact: Sue Brown		Staff: LAG				50%) \$1,687.50	
MP Lien: 6/11/2004		Lien for full amount of patient bill				\$3,375.00			
Johnson Radiology Clinic	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	\$450.00	\$360.00	\$90.00	
Lawrence Christopher -	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	\$21,084.96	\$17,205.33	\$3,879.63	
							Total COC (Cost of Collection):		\$12,328.21
							Total Due to all Subro Sources:		\$25,029.99
Subrogation Source	DO NOT Pay	Interest	Nego \$	Due Verified	Total Paid	COC Fee	Total Due		
Claimant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00		\$0.00		
BSMS Insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$37,358.20	33%)\$12,328.21	\$25,029.99		

Subro Cost of Collection (COC) Assignment Area

Total COC Available:		\$12,328.21
Claimant's Portion:	100%	\$12,328.21
Firm's Portion:	0%	\$0.00

Expand All Collapse All Print Video Help

Final amount due to each Medical Provider after Subro Payments. Enables tracking of the firm's negotiations with each provider as well as final verification of amount due.

Final amount due to each Subro Source taking into account Cost of Collection and any negotiations.

Control Cost of Collection disbursement between the client and firm.

Offer/Demand history is always visible. Click any entry to see the resulting Firm & Claimant net.

Enter a Claimant Authorized Net and see the required Settlement Amount. A quick & easy reality check for you & your client.

The screenshot shows the CaseWORTH software interface for Ronald Smith. At the top, there are buttons for 'Claimant Info', 'Case Info', 'Medical Expense \$56,068.69', 'Subro Payments \$41,436.55', and 'Future Medical \$31,021.57'. Below these are buttons for 'Past Earning \$18,116.64', 'Future Earning \$519,852.12', 'Travel \$735.33', 'Burial \$19,870.45', and 'Other \$28,371.12'. A 'Settlement Calculator' button is circled in red. The 'Demand/Offer History' table shows two entries: a counter offer of \$775,000.00 on 9/17/2004 and an initial demand of \$900,000.00 on 8/26/2004. The 'Actual Settlement' table shows a proposed settlement of \$775,000.00, with various deductions for firm's fee, expenses, and medical due, resulting in a claimant net of \$435,103.67. The 'What If Calculator' table shows a similar calculation but with a 40% firm's fee, resulting in a claimant net of \$433,329.29. A status bar at the bottom provides a detailed calculation summary.

Item	Amount
Proposed Settlement	\$775,000.00
Firm's Fee: 39.1%	303025
Firm Expenses:	\$1,640.72
Medical Exp. Due:	\$10,200.62
Subro Due:	\$25,029.99
Subro COC:	\$12,328.21
Subtotal Remaining:	\$422,775.46
Subro COC 0% Firm:	\$0.00
Firm Net:	\$303,025.00
Subro COC 100% Claimant:	\$12,328.21
Claimant Net:	\$435,103.67

Item	Amount
Proposed Settlement	\$775,000.00
Firm's Fee: 40%	\$310,000.00
Firm Expenses:	\$1,640.72
Medical Exp. Due:	\$5,000.00
Subro Due:	\$25,029.99
Subro COC:	\$12,328.21
Subtotal Remaining:	\$421,001.08
Subro COC Firm: 0%	\$0.00
Firm Net:	\$310,000.00
Subro COC Claimant: 100%	\$12,328.21
Claimant Net:	\$433,329.29

The 'Actual Settlement Calculator' always contains the updated disbursement totals and shows the current Firm and Claimant Net amounts. Negotiations with Medical Providers & Subro Sources as well as any fee adjustment are taken into account as well.

When a favorable settlement is reached, click to create Settlement Statement - ready for the client to sign.

Use the 'What If' Calculator to adjust the numbers and examine the results of any possible scenario. Click 'Copy What If Calculator to Memo' to save the details of any scenario.

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info Medical Expense \$56,068.69 Subro Payments \$41,436.55 Future Medical \$31,021.57
 Past Earning \$18,116.64 Future Earning \$519,852.12 **Travel \$735.33** Burial \$19,870.45 Other \$28,371.12
 Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

Total Travel Expenses:						\$735.33
Trip #	Start Date	End Date	Trip Description	Add/View	Total Expense	
1	2/6/2004	2/11/2004	Trip to Dallas for Spinal Surgery		\$313.78	
	Auto Mileage	32	Miles X \$0.375 =	\$12.00	\$12.00	
	Air Fare	SW Airlines to Dallas-Roundtrip			\$220.00	
	Lodging	Hotel night before surgery/Hampton Inn			\$69.00	
	Meals				\$12.78	
2	4/14/2005	4/18/2005			\$377.00	
4	6/29/2005	6/29/2005			\$22.28	
3	7/2/2005	7/2/2005			\$22.28	

Track basic or detailed client travel expenses for treatments, etc. Enter mileage for frequently visited medical providers and CaseWORTH will automatically create the related travel expense entries. This total is carried to the Damage Summary tab.

Expand All Collapse All Print Video Help

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Total Travel Expenses						\$735.33
Trip #	Start Date	End Date	Trip Description	Add/View	Total Expense	
1	2/6/2004	2/11/2004	Trip to Dallas for Spinal Surgery		\$313.78	
	Auto Mileage	32 Miles X	\$0.375 =	\$12.00	\$12.00	
	Air Fare	SW Airlines to Dallas-Roundtrip			\$220.00	
	Lodging	Hotel night before surgery/Hampton Inn			\$69.00	
	Meals				\$12.78	
2	4/14/2005					
4	6/29/2005					
3	7/2/2005					

Travel Expenses for Trip# 1

Trip Start Date: 6/2004 Trip End Date: 2/11/2004

Service Date	Provider	Service Description	Statement Date	View Statement
2/7/2004	Johnson Radiology Clinic	MRI Xray Evaluation	2/22/2004	
2/7/2004	Griffin Anesthesiology	Surgical Anesthesia	4/14/2004	
2/7/2004	Lawrence Christopher - St.	ER Services	2/15/2004	
2/7/2004	Dr. Don Brown	Orthopedic surgery on R hip, R	2/17/2004	

CaseWORTH can track and report what Medical Providers were visited and what services were performed for any Travel entry.

Auto Mileage	\$12.00
Air Fare	\$220.00
Lodging	\$69.00
Meals	\$12.78
Total:	\$313.78

Close

Expand All Collapse

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info Medical Expense \$56,068.69 Subro Payments \$41,436.55 Future Medical \$31,021.57

Past Earning \$18,116.64 Future Earning \$519,852.12 Travel \$735.33 Burial \$19,870.45 Other \$28,371.12

Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math worksheet Settlement Calculator

			Total Burial Expenses:	\$19,870.45
Date	Description	Add/View	Amount	
2/9/2004	Internment Supplies (Coffin, Vault, etc)			\$12,670.45
2/11/2004	Sarah Smith Funeral Service-White Funeral Home			\$7,200.00

Burial Expenses simply show a date, description and amount. The total is carried to the Damage Summary tab.

Print Video Help

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info Case Info Medical Expense \$56,068.69 Subro Payments \$41,436.55 Future Medical \$31,021.57
 Past Earning \$18,116.64 Future Earning \$519,852.12 Travel \$735.33 Burial \$19,870.45 Other \$28,371.12
 Firm Expenses \$1,640.72 Exp/Liens Due \$35,230.61 Damage Summary Math Worksheet Settlement Calculator

			Total Other Expenses:	\$28,371.12
Date	Description	Add/View	Amount	
3/17/2004	Mr. Smiths 2003 Chevy Silverado truck was totaled		\$28,371.12	

The Other Expenses tab tracks miscellaneous damages and expenses like loss of personal property. Simply enter a date, description and amount for each item. The total is carried to the Damage Summary tab.

Print Video Help

CaseWORTH - Ronald Smith.cwf

File Case Info Tools Reports Help

Claimant Info
Case Info
Medical Expense \$56,068.69
Subro Payments \$41,436.55
Future Medical \$31,021.57

Past Earning \$18,116.64
Future Earning \$519,852.12
Travel \$735.33
Burial \$19,870.45
Other \$28,371.12

Firm Expenses \$1,640.72
Exp/Liens Due \$35,230.61
Damage Summary
Math Worksheet
Settlement Calculator

Total of Claimant Out of Pocket Expenses (less Past Medical Expenses, Subro, Firm Expenses & Fee)	=	\$617,967.23
Future Medical (Present Value)	+	\$31,021.57
Past Earnings	+	\$18,116.64
Future Earnings (Present Value)	+	\$519,852.12
Travel Expenses	+	\$735.33
Burial Expenses	+	\$19,870.45
Other Expenses	+	\$28,371.12
Claimant Out of Pocket Medical Payments	+	\$0.00
Total of Claimant Out of Pocket Expenses (less Past Medical Expenses, Subro, Firm Expenses & Fee) No Future Damages	=	\$67,093.54
Past Earnings	+	\$18,116.64
Travel Expenses	+	\$735.33
Burial Expenses	+	\$19,870.45
Other Expenses	+	\$28,371.12
Claimant Out of Pocket Medical Payments	+	\$0.00

Choose from the existing templates or customize your own to see the financial details the way you want to see them. The templates support math functions to give you any combination of values you require. Just like any tab in CaseWORTH, the results of any template may also be printed.

Math Worksheet Template: Client Out of Pocket (No Past Meds, Subro, FirmExp) Print Video Help