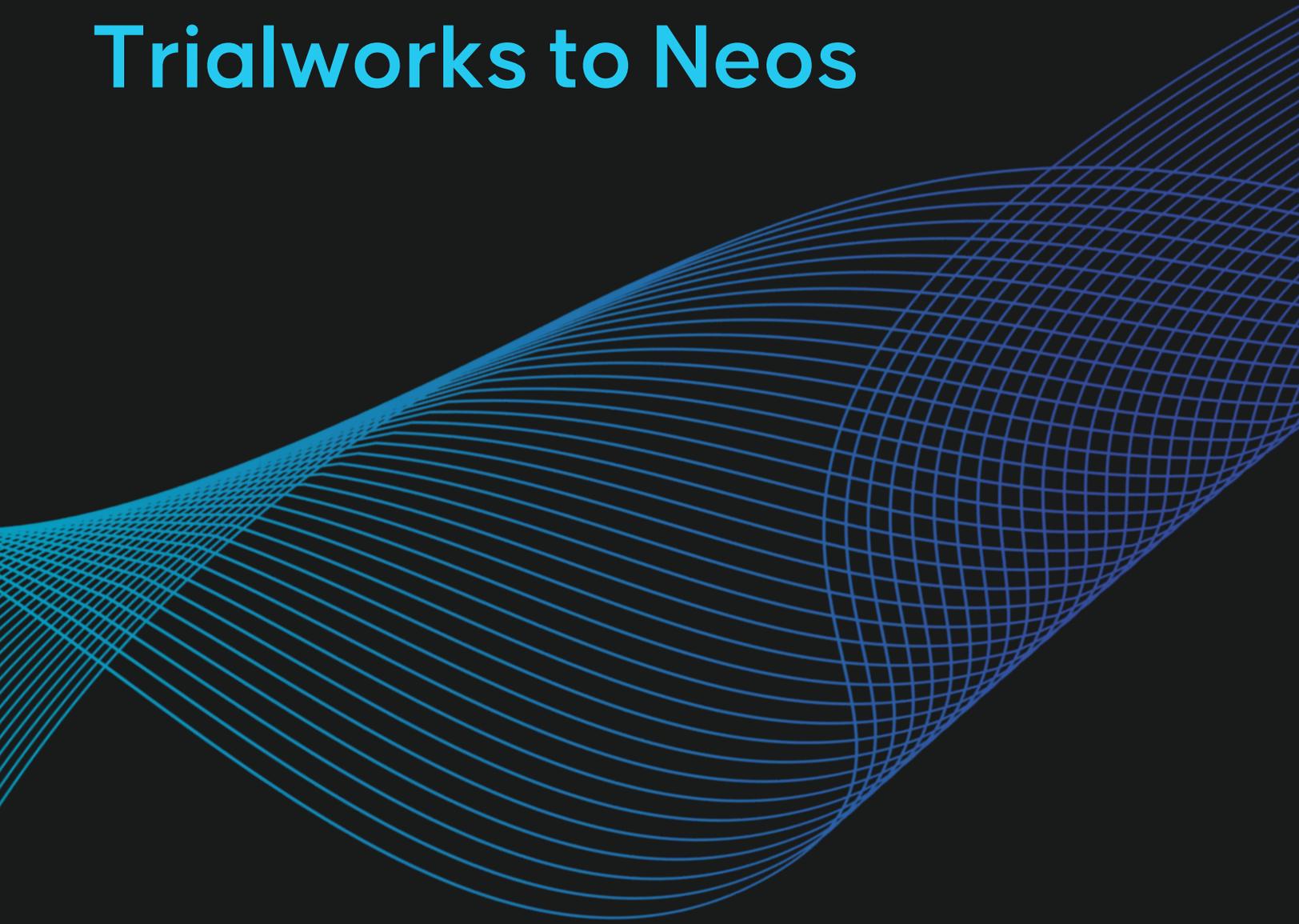




# Navigating the Transition from Trialworks to Neos



# Navigating the Transition from Trialworks to Neos

Are you considering migrating your law firm's case management system from Trialworks to Neos? Understanding how specific features from Trialworks will be adapted to fit into the Neos environment will help you navigate the migration process smoothly and get the most out of Neos.

Below, we dive into an overview of the essential features and functionality of Neos, the next generation of case management software, to help you navigate this transition seamlessly.

## Key takeaways:

- Preparing for migration by verifying case assignments and cleaning up existing data helps to ensure accuracy and system efficiency.
- Neos streamlines the transition of case-related information from Trialworks, ensuring that essential data is easily accessible and well-organized in a cloud-based platform.
- Neos enhances the functionality of dashboards and calendars, allowing for better tracking and display of case activities and reminders.
- The advanced integration capabilities in Neos facilitate more efficient workflows by allowing seamless interaction with frequently used applications, enhancing overall productivity.
- Neos enhances document handling by organizing employment, settlement, and medical information into a more manageable and accessible format.

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## Preparing for Migration

To ensure a smooth migration process, it is important to take the necessary steps to prepare. Here's a rundown of how your firm can get ready for migration:

1. Start by verifying that all cases have assigned attorneys and support, as well as liability and sub-liability assignments. It is important to ensure that cases have been properly closed and that all relevant documents are linked in the case folder.
2. Review and push any necessary docket entries from Trialworks to Outlook, ensuring that past due or completed entries are marked as completed.
3. As part of the preparation, it is advisable to clean up any misspellings or duplicates in attorney/support names and review and remove any unused Trialworks libraries, including case types, categories, status/priority codes, contact types, docket activities, client roles, and divisions.

By proactively addressing these recommendations, you can optimize the migration process and streamline your workflow in the new system.

## Getting the most out of the features and functionality in Neos

Trialworks and Neos serve the same purpose. However, Neos has taken those features to the next level to help you better serve the needs of your clients. With Neos, firms have the flexibility that allows for a customizable experience to make workflows more efficient. Let's look at some of the key functionality that Neos provides.

## Organizing Documents in Neos: List View vs. Folder View

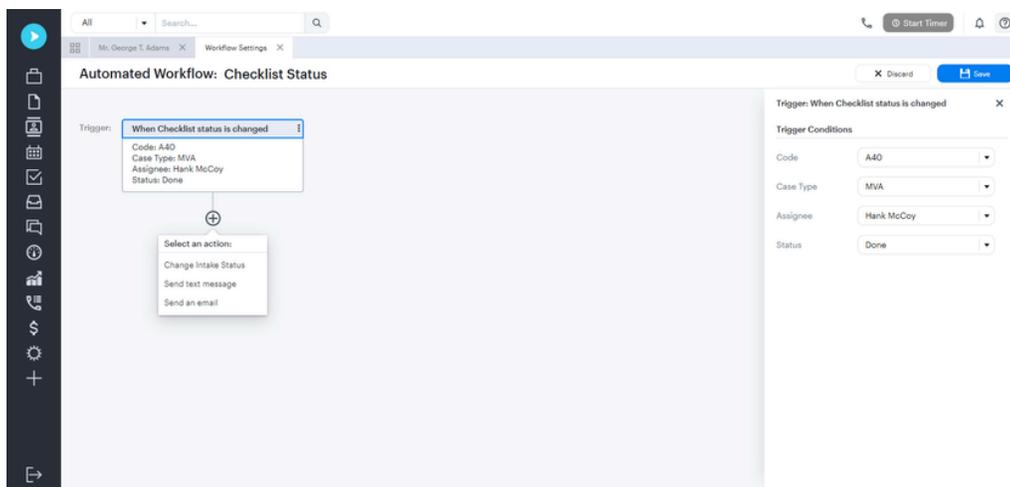
Where are documents located in Neos? Documents are found in the Case Docs (Document) Tab in Neos, with a sub-tab that corresponds to the original Trialworks tab.

Neos offers two views to access documents: List View and Folder View. List View presents all your documents in a simple, detailed list format. It is straightforward, clean, and easy to navigate. On the other hand, Folder View categorizes documents into different folders. It's the better choice for those who prefer a structured layout. Users can try out both layouts and choose the view that best suits their needs.

## Managing Dashboards and Case Calendars

Reminders in Neos are a bit different from Trialworks. In Trialworks, reminders were populated from Docket entries. In Neos, the My Dashboards are populated by Checklists and Case Calendars.

If the Docket entry in Trialworks was sent to Outlook, those entries would appear on the Case Calendar in Neos. All other items will appear on the Checklist. If the Docket entry had multiple people assigned, through the conversion, the first person on the list will be assigned the entry in Neos.



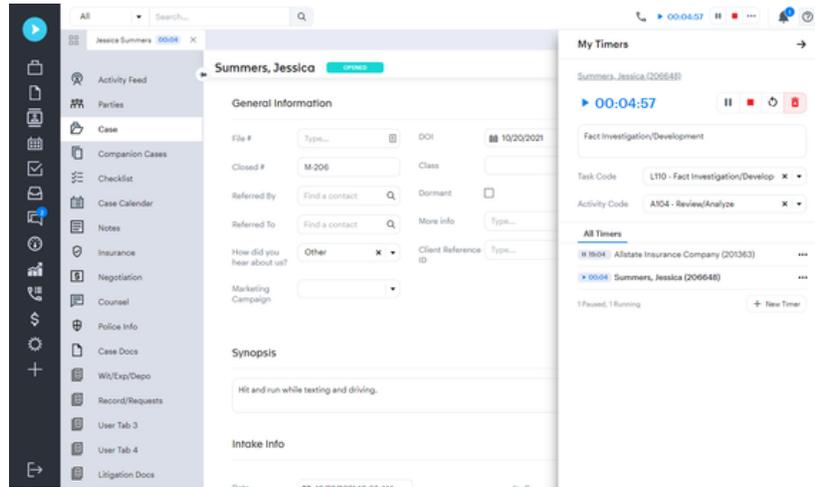
## Quick Notes and Summary Tab

In Neos, the Quick Notes feature will be available as the Special Notes, ensuring that attorneys can continue to easily document critical information on the fly.

Additionally, the Trialworks Summary Tab does not have a direct equivalent in Neos. Instead, the information it contained was from other fields within Trialworks. This means that you won't lose any data.

# Time Tracking

Time tracking is an essential aspect of case management, and in the transition from Trialworks to Neos, all time entries from the Trialworks TimeKeeper are moved to the Neos Time Tab. If an author is not identified in Trialworks for a time entry, a conversion fallback is designated in Neos to ensure no data is lost in the transition.



Another thing to keep in mind is that documents and images from the Production Tracker in Trialworks now move to the Neos Case Docs (Documents) Tab.

# Email and Notes

The Trialworks email tab has moved and is now loaded in the Neos Notes Tab. To find this, head over to the emails tab in Neos Notes. Additionally, the Trialworks Notes Tab is now referred to as the Neos Notes Tab. Each entry is migrated to Neos with similar column names and any documents attached to a note gets moved to the Neos Case Docs Tab.

# Trialworks History Tab vs. Neos Activity Feed

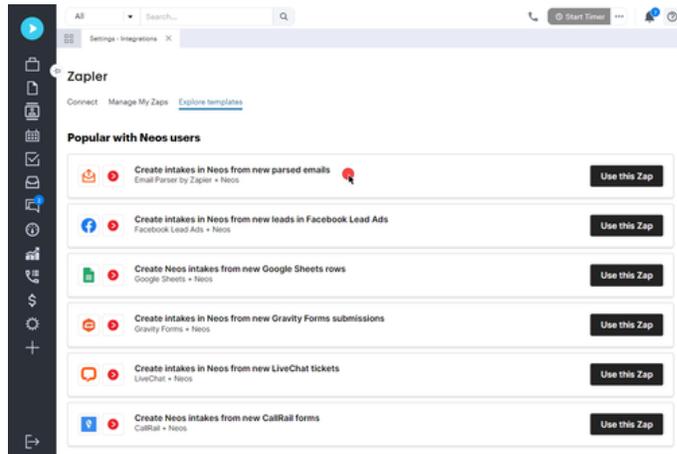
One of the key features that sets Neos apart is its intuitive and user-friendly Activity Feed. This feature replaces the History Tab seen in Trialworks. Here's a breakdown of what it looks like:

- The Activity Feed provides information in a timeline format like a chronological overview of case activities.
- It offers a swift and clear understanding of what's going on in a case including the full timeline of a case and the date that the last item was marked completed.



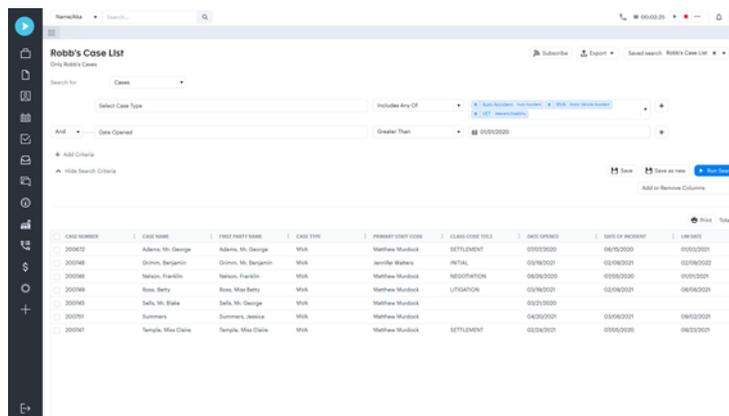
# Integrations

When firms transition to Neos, they gain access to robust integrations, eliminating the need to switch between applications. Neos seamlessly integrates with a variety of popular applications, continuously expanding its compatibility with new additions each month. With Neos, users can conveniently access Microsoft Office 365, including Outlook and Calendar, alongside DocuSign, QuickBooks, RingCentral, and more, all without leaving their case management software.



## Case Information: Where to find critical data

All of your case-related information is located in our centralized cloud-base Neos platform. Understanding what transfers and what is merged into a new functionality is vital during the preparation phase and once you've fully migrated. For instance, key information that was once located on the Trialworks Case Info Tab can now primarily be found on the Neos Case Tab. While some information including Invitees/Service Email, NCW, Case Budget, JCNo., Case Password, Storage Date, and Firm Name do not get transferred to Neos.



On the other hand, some fields find a new home in Neos. For example, Rainmaker, Type of Fee, Value, Referral 2 and 3, Fee or Referral %, and Fee move to the Neos Management Tab. Yet, some additional critical data, like Settlement Info, moves to the Neos Value Tab.

## User-Defined Fields

The Neos Case Tab includes standard fields that carry information from the Trialworks Case Info Tab, such as Case Facts. These Neos User Defined Fields are built into the conversion to bring information from the Trialworks Case Info Tab standard fields to the Extras section.

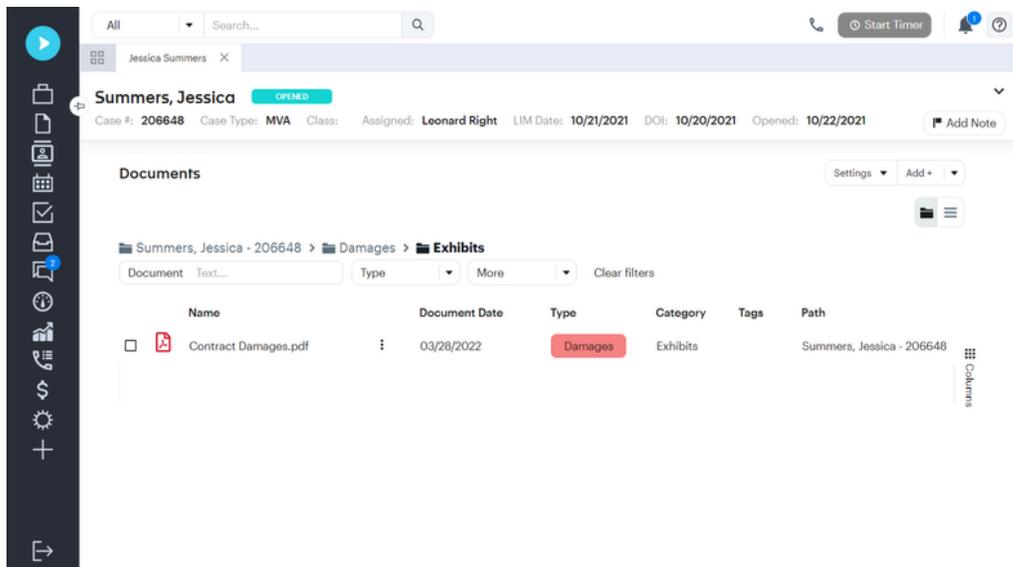
In the Neos Case Tab, you'll also see Court Information. In Trialworks, this type of information was used for template generation, but now this is not needed as the functionality is built into Neos.

You can also find alternative User-Defined Fields on the Management Tab provide flexibility and customization for user's case management needs. It ensures that all necessary information from the Trialworks Case Info Tab makes its way into Neos.

## Client and Other Parties

Information from the Trialworks Client and Other Parties Tabs has shifted to the Neos Party Tab, and information is split between standard and user defined fields. Other important information to keep in mind:

- Counsel Tab: If a counsel was identified on the Trialworks Other Parties Tab, the information will be found on the Neos Counsel Tab.
- Caption Tab: In the transition, the default or first caption from the Trialworks Caption Tab is brought over to the Neos Case Tab under the Court Information Section.
- Contacts and Related Contacts: Contacts from Trialworks are moved to the Neos Case Contacts and Related Contacts tabs. Additional functionality including Save As, Case Notes, Communications/History logs, and Contact Documents will be switched to the Provider Card in Neos.



## Employment/School History

The Employment/School History data from Trialworks has been updated and will find a new home in the Neos Other Contacts tab. This tab can be renamed in Neos, offering firms the ability to maintain the nomenclature they are accustomed to, which was established during the migration process.

## Settlement Information

Settlement amounts and payments from the Trialworks Settlement Info category have now moved to the Neos Value Tab, with an entry for settlement and the payment breakdown under transactions.

## Negotiations

The Trialworks Negotiations Tab, which primarily features the Negotiation Tracker, will be migrated to the Neos Negotiation Tab. Other fields from the Trialworks Negotiations Tab are derived from various fields within Trialworks and will be appropriately mapped to Neos. In instances where there is no corresponding field in Trialworks for staff, Neos will use a conversion fallback as a placeholder.

## Investigation Information

Information from the Trialworks Investigation Tab will be transitioned to either the Neos Accident Info or the Incident/Police Tab. All associated documents will be moved to the Neos Case Docs Tab.

## Medical and Billing Information

All insurance information is migrated to Neos Case Docs Tab. If the Trialworks entry did not identify an Insurance Type, it will reflect to Neos Default. This information can be updated in Trialworks prior to migrating to Neos or updated in Neos after going live.

For medical and [billing information](#), this moves to the Neos Case Docs Tab. Any data that was entered into the Trialworks Medical Tab detail window will appear on the document on the Neos Case Docs Tab with the sub-tab called Medical, while any billing entries move to the Neos Value Tab.

# Intakes

All information and documents from the Trialworks Intakes Tab moves to the Neos Intakes Tab. The Trialworks Cost Tab will also shift to the Neos Value Tab, with invoices and check copies going to the Neos Case Docs Tab.

Creating new Intake (NEOS)

Changes have been made on this page.

Case Type: Select... Intake Primary Staff: Albert

**Party Details**

**Initial Details**

First Name (Party-1): Marissa Middle Name (Party-1): Type... Last Name (Party-1): Margot

Prefix (Party-1): Suffix (Party-1): SSN (Party-1):

D.O.B (Party-1): MM/dd/yyyy Role (Party-1):

**Online Accounts (Party-1)**

Type (Party-1): Platform (Party-1): Link (Party-1): Type...

Add Another Online Account

**Emails (Party-1)**

Type: Email: Type...

Add Another Email

**Phones (Party-1)**

Type: Phone: (111) 111-11 Ext. Type...

## Quickly and easily get started with Neos

Understanding these migration details is key to a smooth transition from Trialworks to Neos. Firms can take this opportunity to reorganize and optimize their case management processes, ensuring that the move to Neos enhances their practice's efficiency and productivity.

My Dashboards

Intakes Overview

**Intakes by Stage**

Stage	Count
Smith, Johnson	14
Smith, Johnson	14
Smith, Johnson	14

**Checklist**

Case Name	#	Case #	Case Type	Opened	Status	Staff Assigned
Smith, Johnson		200423-54	MVA	04/03/2020	OPENED	Carla P.
Smith, Johnson		200423-54	MVA	04/03/2020	OPENED	Carla P.
Smith, Johnson		200423-54	MVA	04/03/2020	OPENED	Carla P.
Smith, Johnson		200423-54	MVA	04/03/2020	OPENED	Carla P.
Smith, Johnson		200423-54	MVA	04/03/2020	OPENED	Carla P.

To learn more about how to unlock increased efficiency for your firm with Neos, contact our team of experts at [sales@assemblysoftware.com](mailto:sales@assemblysoftware.com)

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