***MerusCase Template Creator – Personal Injury***

**How This MerusCase Template Creator Works**

To get started, open either an existing or newly created blank document in Microsoft Word. You will use this as the new template for your letter or pleading. Keep your existing/new document open side by side with this *MerusCase Template Creator*, as this will aide in the editing process. Please note that you will need to have *macros* enabled in Microsoft Word in order to utilize this tool properly. The drop down menu bar above (listed under the *MerusCase* Menu above) contains a number of data points called “merge codes” that are representative of their respective data fields found within a given case or matter. After selecting a desired “merge code” from the drop down list above, it will be pasted directly into this *MerusCase Template Creator* document. Copy and paste this merge code string into the desired location of your existing/new Word template. Rinse and repeat the above steps as necessary.

**MerusCase Merge Code Menus Explained**

The *Firm* menus contain information about your firm such as phone number, address, and letterhead.

The *Case Fields* menu contains information relevant to the case, such as Case File Number, status, and date opened.

The *Primary Plaintiff Information* menu has fields related directly to the plaintiff, such as name, address, phone number, email, insurance policy number, insurance claim number, etc.

The *Party Type* menu has fields for the parties associated to the case, based on the role they place in the case, such as defendant, defense attorney, plaintiff’s insurance carrier, doctor, witness, etc.

The *Personal Injury* menu section allows you to access the information you entered into the case’s *Incident Tab* concerning the matter related to your client, such as date of incident, police report number, weather conditions, etc.

The *Other* and *Field Shortcuts* menus allow you to quickly automate certain tasks such as populating today’s date or autofill the user’s name/contact information. These actions help speed up document creation process as well as eliminate repetitive processes.

**The Final Step**

When you have completed the above template creation process you will then have to upload the newly created document into MerusCase. Properly name and save the template to a location that’s easy to find on your local computer. While in MerusCase, navigate to the *Documents Menu* and click on “Upload Tool”. Select the “Office (MS Word) Template” option from the drop down menu and then click on the folder icon to open your computer’s file explorer window. Select your desired template and click “Open”. Your selected template will be displayed below the folder icon. Click on *Upload* from the top right hand corner of the Upload window.

You are now ready to test out your newly created template. Navigate to a case of your choosing, locate the template and merge away! If changes need to be made after your testing is complete just follow the instructional steps listed above.