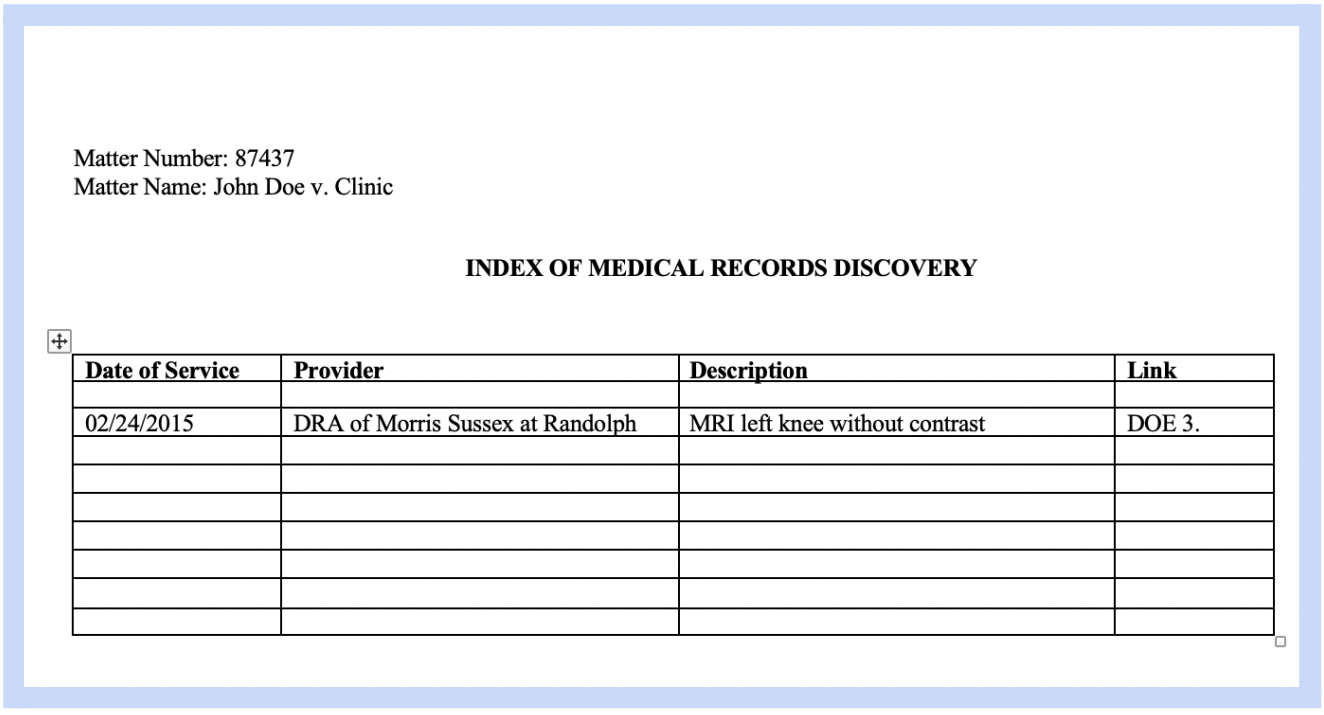
Using Clearbrief in Word to build a hyperlinked Medical Records Index (or any other interactive index for trial or depo prep)

STEP 1. Open a Word document and create columns that represent the fields you want to document in order to create a helpful index that you can refer to throughout the life of a case.

- For example, for a medical records index, create columns for “Date” “Provider” “Description” and “Link.”

STEP 2. Add an example reference/Bates number showing how you want to refer to the batch of medical records you’re indexing (here, I used “DOE” and the page number, but you can use anything you want, like “TRIAL EX at 4”).

- Note that if you are creating the index in a formatted **table**, you will need to add a period at the end of your page number. For example, DOE 3.

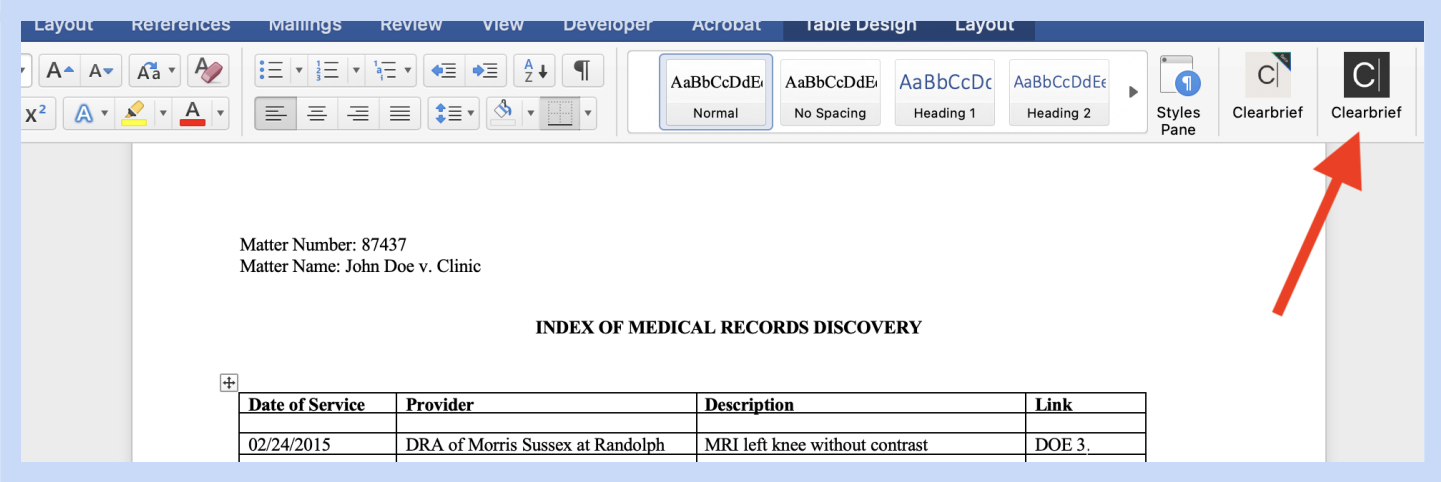


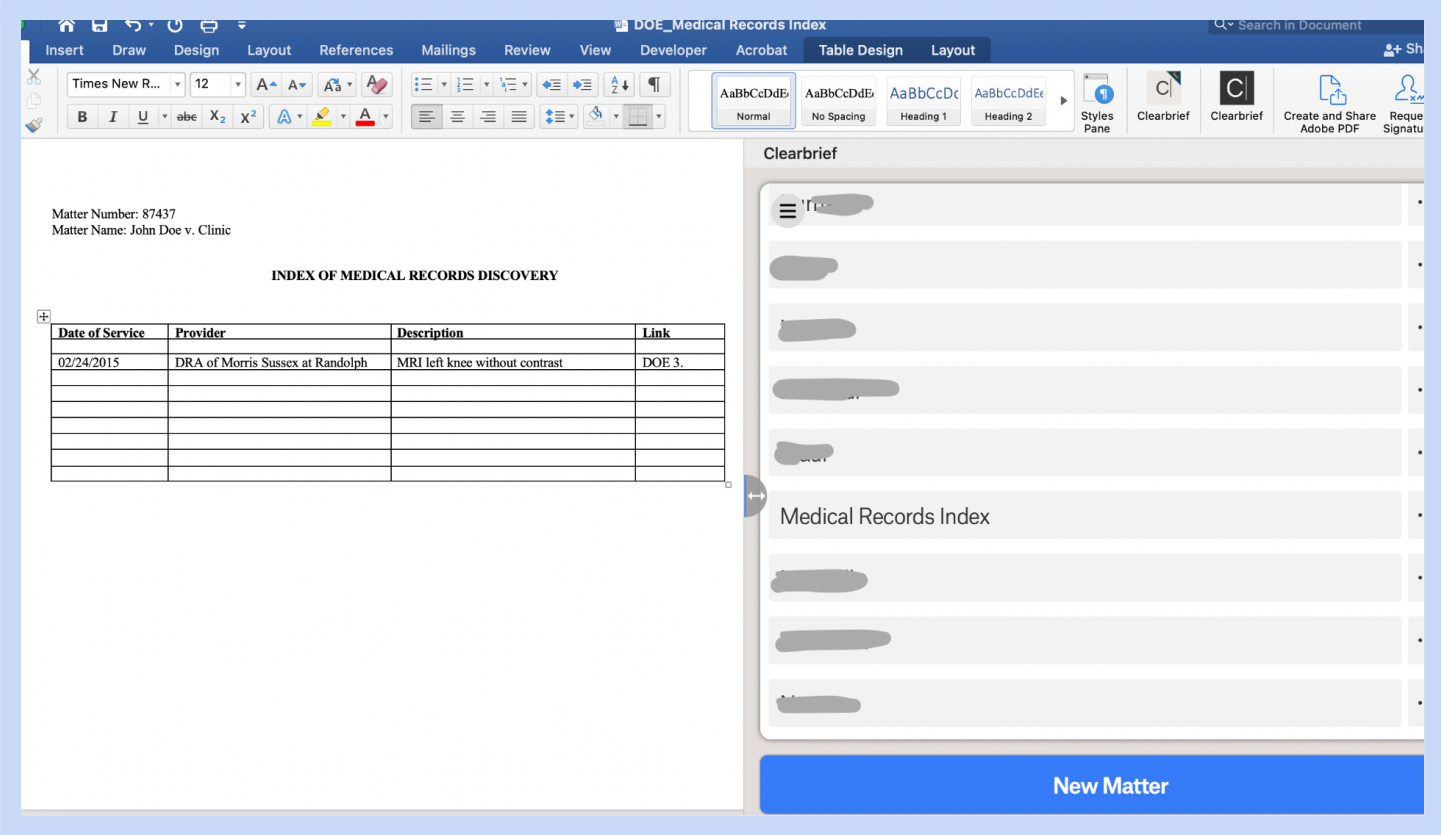
Matter Number: 87437
Matter Name: John Doe v. Clinic

INDEX OF MEDICAL RECORDS DISCOVERY

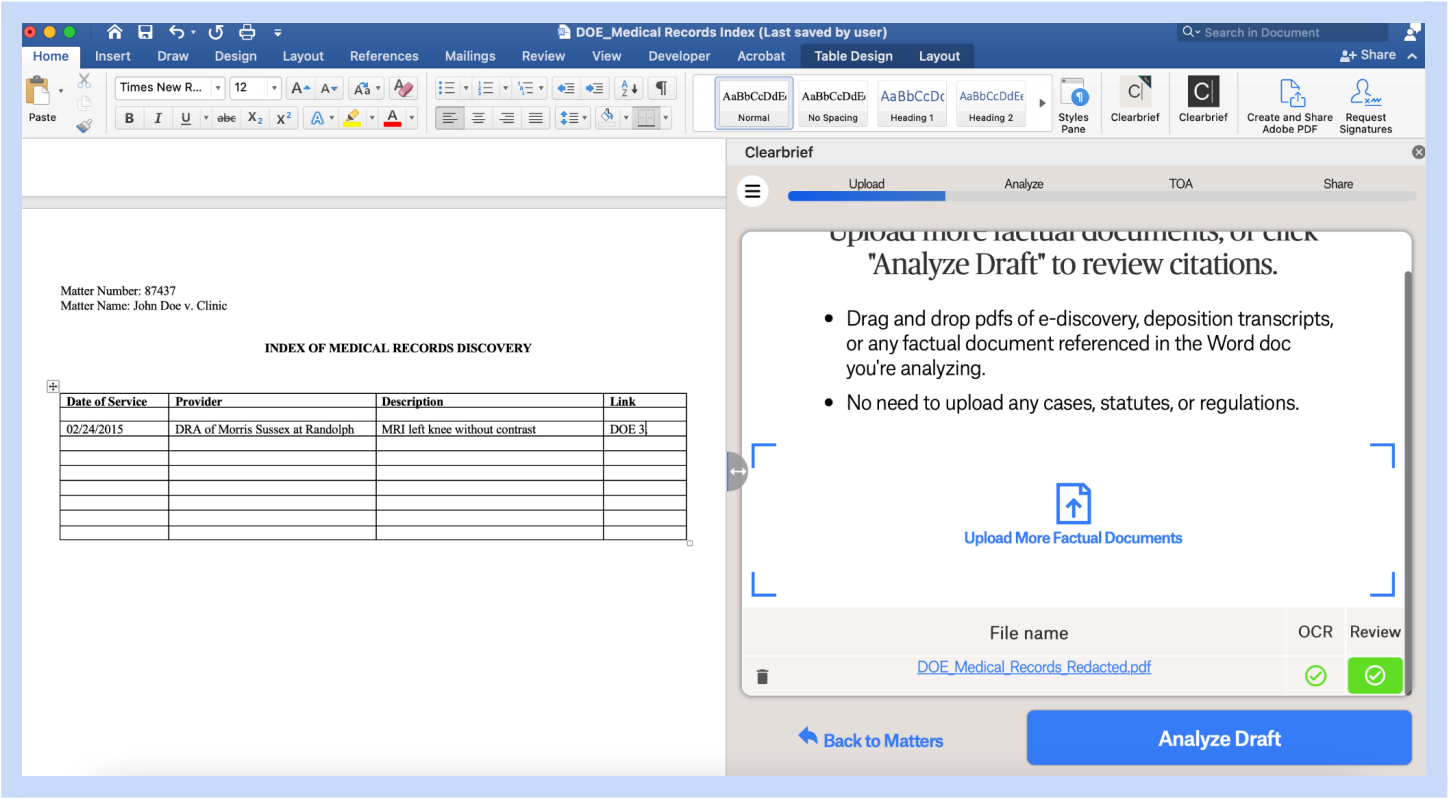
Date of Service	Provider	Description	Link
02/24/2015	DRA of Morris Sussex at Randolph	MRI left knee without contrast	DOE 3.

STEP 3: Click the Clearbrief icon at the top right of your toolbar to launch the Add-In, and click on the Matter that is relevant to the index you're creating (or create a New Matter).

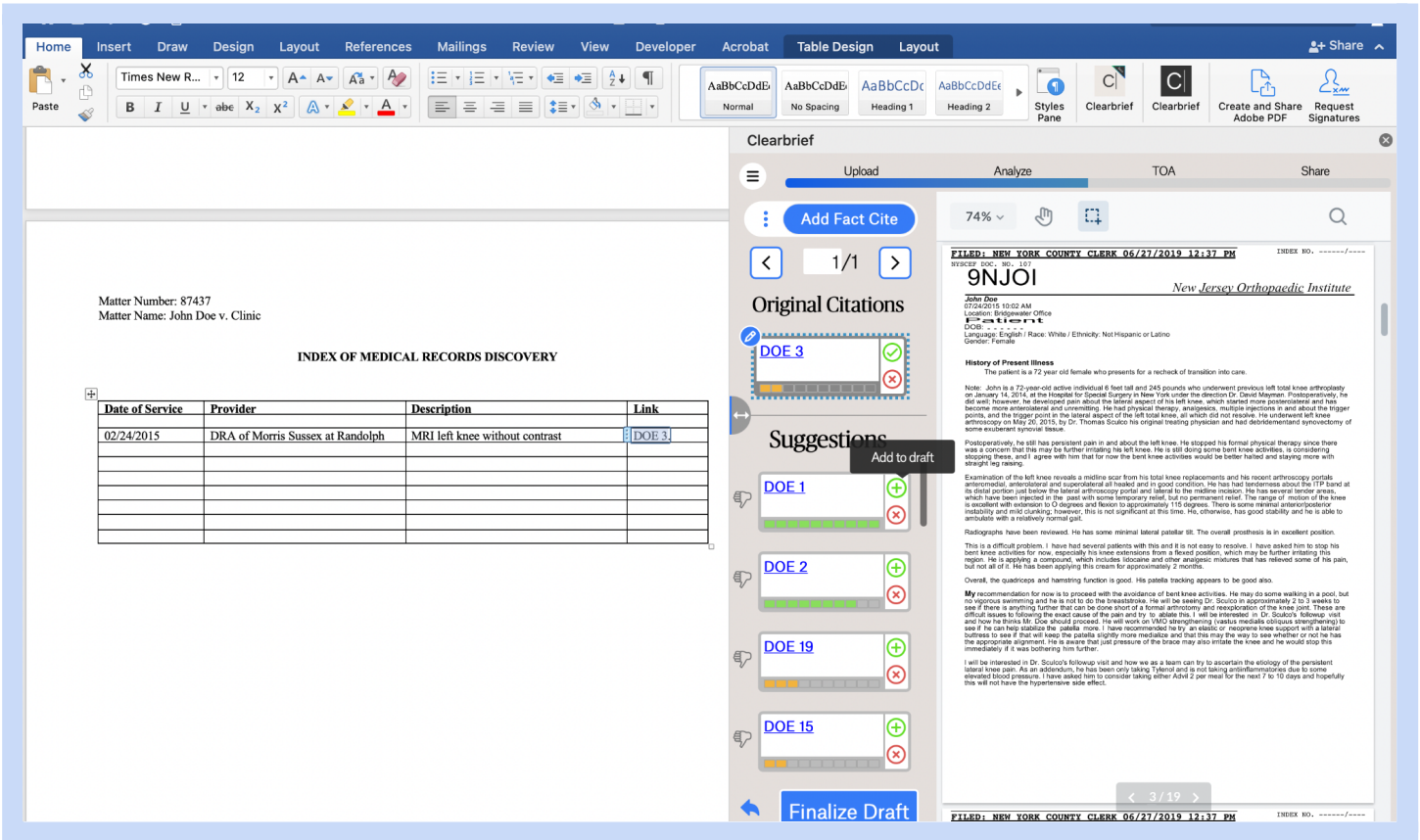




STEP 4: Upload the pdfs of medical records into that folder and follow the prompts to tell Clearbrief that you will cite to this batch of pdfs as “DOE” and page number.

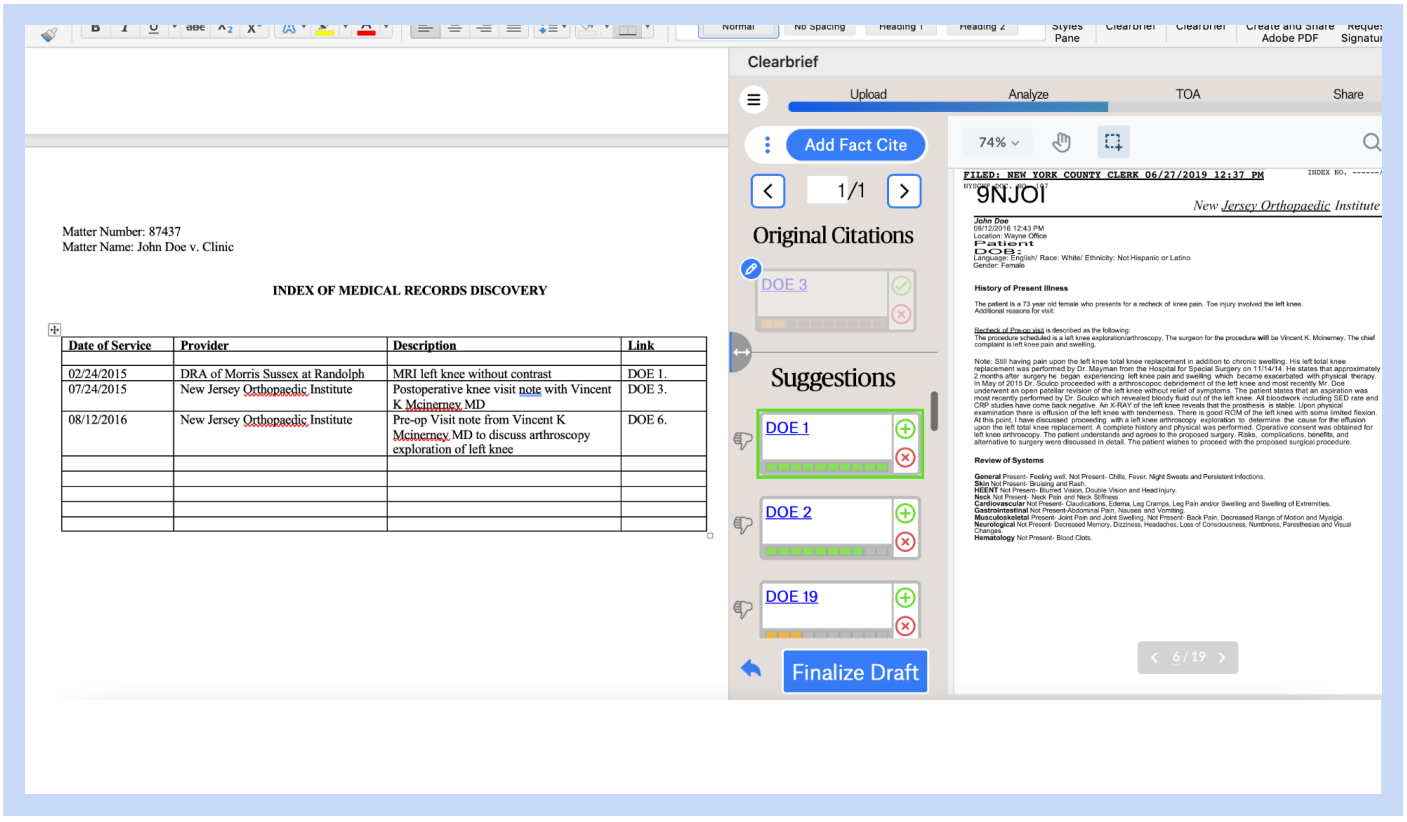


STEP 5: Click the blue Analyze Draft button, and Clearbrief will process your index and display the medical records pdf on the right-hand side of Word. (You can drag to enlarge the pdf side of the screen so you can see it better!)

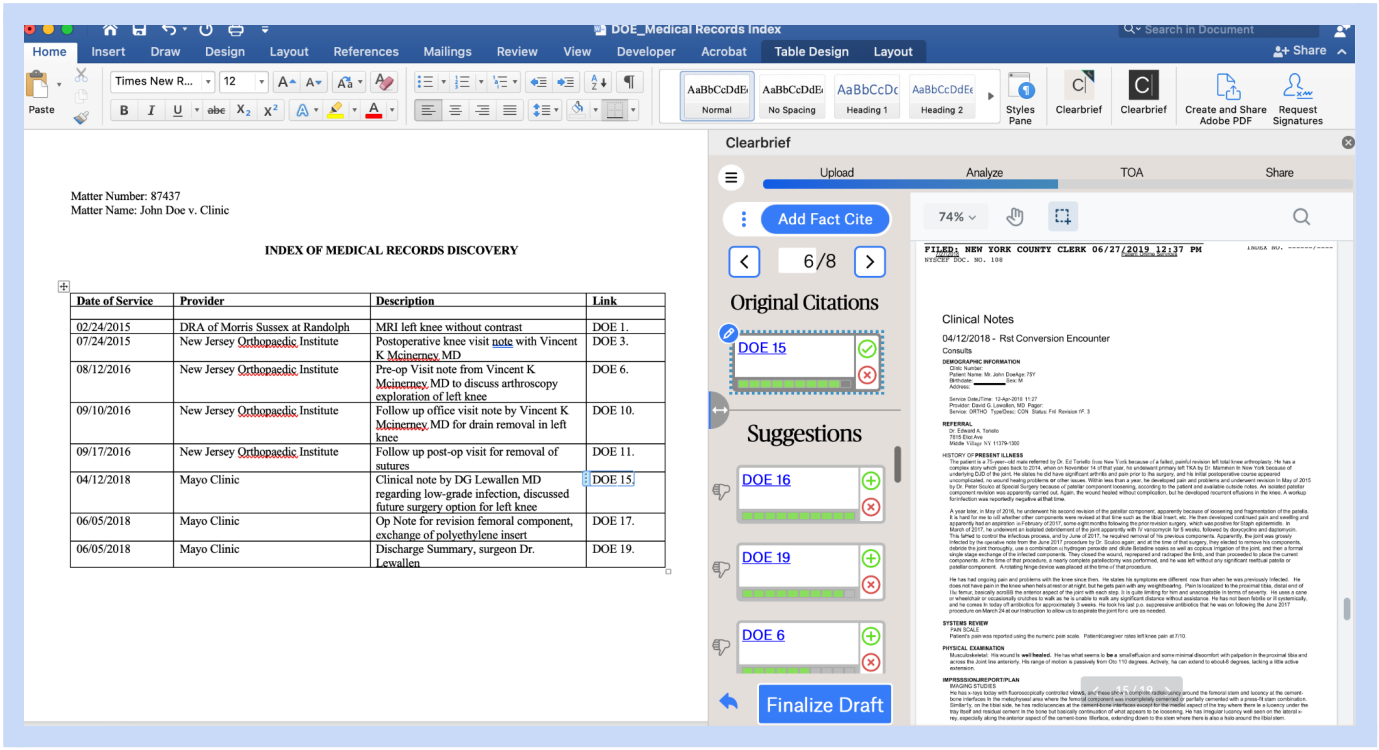


- **BONUS:** Since you have created a sample entry to kick things off, Clearbrief will look for the relevant description text you've added and suggest which page of the pdf is likely to contain this medical record. Here, by analyzing the date and text in your entry, Clearbrief's AI correctly suggests that this medical record is actually located at DOE page 1 (instead of DOE 3, as you originally put).

STEP 6: Now that you have the pdf pulled up for you right in Word, continue filling in your medical records index as you scroll through the document, and add the correct page numbers as you work on the index.



STEP 7: When you're done creating the index, simply click the blue "back" button at the bottom to analyze the document again. Now Clearbrief will recognize all of your references to the DOE pdfs and **display the correct page of the document when you click on any DOE reference in the column!** You can come back to add to this index whenever you get more documents in, and share this interactive Word doc index with others at your firm.



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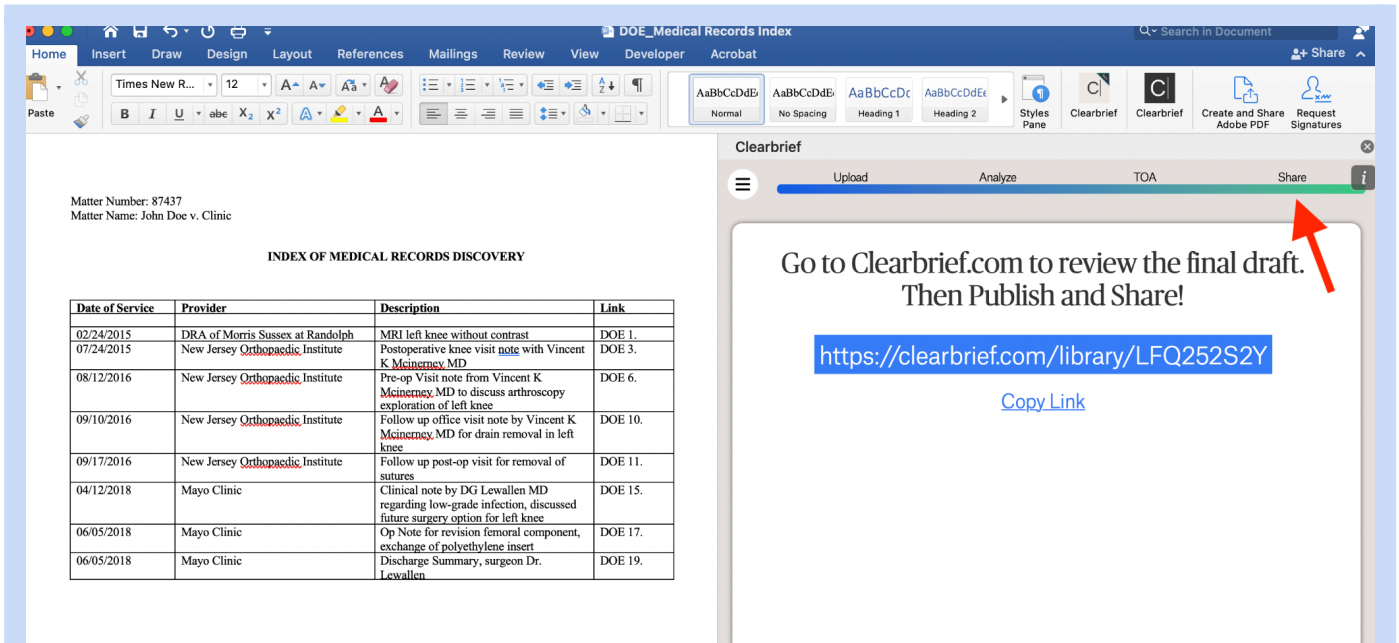
07/24/2015	New Jersey Orthopaedic Institute	Postoperative knee visit note with Vincent K Mcinerney MD	DOE 3.
08/12/2016	New Jersey Orthopaedic Institute	Pre-op Visit note from Vincent K Mcinerney MD to discuss arthroscopy exploration of left knee	DOE 6.
09/10/2016	New Jersey Orthopaedic Institute	Follow up office visit note by Vincent K Mcinerney MD for drain removal in left knee	DOE 10.
09/17/2016	New Jersey Orthopaedic Institute	Follow up post-op visit for removal of sutures	DOE 11.
04/12/2018	Mayo Clinic	Clinical note by DG Lewallen MD regarding low-grade infection, discussed future surgery option for left knee	DOE 15.
06/05/2018	Mayo Clinic	Op Note for revision femoral component, exchange of polyethylene insert	DOE 17.
06/05/2018	Mayo Clinic	Discharge Summary, surgeon Dr. Lewallen	DOE 19.

LAST STEP (OPTIONAL): Click on the "Share" button in Word to create a web-based version of this document in your account on the Clearbrief **website**. You can now securely email a web-based version of this interactive medical records



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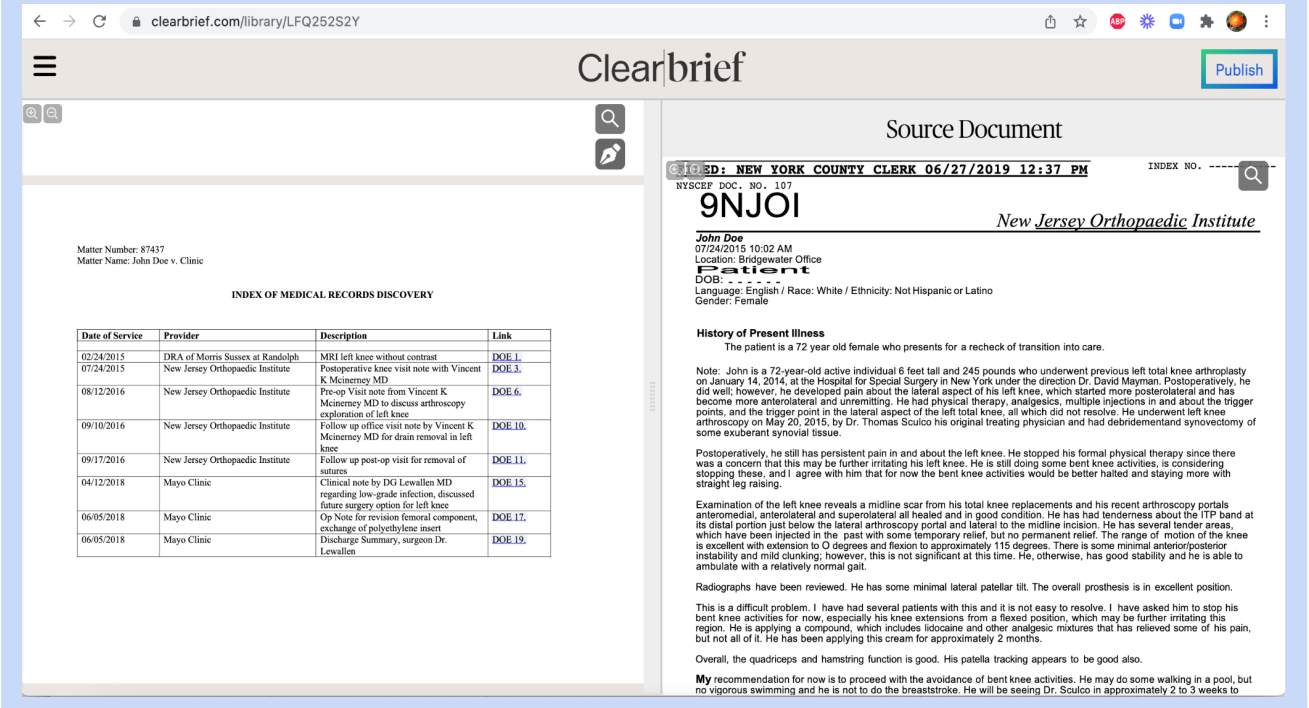
index to anyone, such as to co-counsel at another firm, and they will be able to review the referenced medical record documents simply by clicking on the “DOE” citations (they do NOT need a paid version of Clearbrief).

You’ll be able to pull up this index on the fly on phone calls and during remote or in-person depositions and trials: simple share your screen and click to display the document in question.



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