

**DOMESTIC (FAMILY) LAW
PRACTICE AREA TEMPLATE**
for Time Matters[®]/Total Practice Advantage[®]

By
IP ASSOCIATES, LLC

Why do *you* need a Practice Template?

- *Tired of using the one size fits all setup that shipped with Time Matters?*
- *Frustrated that Time Matters isn't as easy to use as you expected?*
- *Concerned that a custom-tailored Time Matters configuration is too expensive and/or time consuming?*
- *Too busy practicing law to worry about designing and customizing software?*

DOMESTIC FORM

Primary Tab

The Primary tab contains most of the key information about the case. Easily keep track of the current Stage of the case, key contacts related to the case via single-click lookups, key dates, referral source, and court information.

The screenshot shows the 'Matter Form - Change' application window. The title bar reads 'Matter Form - Change'. The menu bar includes 'File', 'Edit', 'View', 'Process', and 'Help'. The toolbar contains icons for 'Save & Close', 'Save', 'Print', 'Cancel', and a help icon. The main area is divided into several sections:

- Primary Tab:** Contains fields for 'MatterRef' (Smith, Rachel Dissolution), 'Code' (DOM|Domestic), 'MatterNo' (06-099), 'Venue' (WHITESIDE), 'Staff' (RSB|Robert S Brown), 'Stage', 'Update Dt' (3/14/2008), 'Client' (Rachel Smith), and 'Status' (Open).
- Primary Contact:** Fields for 'Pri Contact' (Rachel Smith), 'Firm', 'Address' (45 E. 9th St), 'City' (Altoona, IL, 65165), and 'Tel/Fax' (842-555-8419).
- Key Dates & Info:** Fields for 'Filed' (12/12/2006), 'Srv Affid' (12/15/2006), 'Parenting', and 'Div Class'.
- Key Contacts & Info:** Fields for 'Our Side' (Petitioner), 'Adverse' (Roger Smith), 'Opp Atty' (Maria S. D'Ambrose), and 'Mediator'.
- Links & Referral:** Fields for 'Docs Folder' (Smith, RachelDissolution), 'Email Subj', and 'Ref Src' (Yellow Pages).
- Case Info:** Fields for 'Case #', 'Circuit' (FOURTEENTH), 'Judge' (Susan M. Cottrill), 'Clerk', and 'Rm #'.

The window also features a vertical sidebar on the right labeled 'Matters - Primary' and a horizontal tab bar at the top with options: Primary, Secondary, Additional, Custom, Related, Notes, Documents, Phone, Email, Mail, Lexis, Billing, and Timeline.

DOMESTIC FORM Secondary Tab

The screenshot shows a software window titled "Matter Form - Change". The menu bar includes "File", "Edit", "View", "Process", and "Help". The toolbar contains icons for "Save & Close", "Save", "Print", "Cancel", and a help icon. The tab bar shows "Primary", "Secondary" (selected), "Additional", "Custom", "Related", "Notes", "Documents", "Phone", "Email", "Mail", "Lexis", "Billing", and "Timeline".

Fields in the form include:

- MatterRef: **Smith, Rachel Dissolution** (highlighted)
- Code: **DOM|Domestic**
- MatterNo: **06-099**
- Venue: **WHITESIDE**
- Staff: **RSB|Robert S Brown**
- Stage: (empty)
- Update Dt: **3/14/2008**
- Client: **Rachel Smith**
- Notify:
- Trigger:
- Review:
- Billable:
- Private:
- Status: **Open**

A large text area labeled "General Notes" is visible at the bottom right of the form.

- The Secondary tab leaves you plenty of room to add your own fields and includes a large free form Memo field to take extensive notes about the case.

DOMESTIC FORM

Additional Tab

The Additional tab provides an area to track specific post-judgment information about the divorce including support length and frequency.

The case closure area provides key reporting data and storage info for easy retrieval of paper files in the future.

Matter Form - Change

File Edit View Process Help

Save & Close Save Cancel ?

Primary Secondary **Additional** Custom Related Notes Documents Phone Email Mail Lexis Billing Timeline

MatterRef **Smith, Rachel Dissolution** Code *DOMIDomestic
MatterNo 06-099 Venue WHITESIDE Staff RSB|Robert S Brown
Stage Update Dt 3/14/2008
Client Rachel Smith Notify Trigger Review Billable Private Status **Open**

Divorce Details

Divorce Dt
Length
Support \$
Frequency

Closure Info

Close Date
Imaged?
Destroy
Loc | Bin

Matters - Additional

CRITICAL INFORMATION AT A GLANCE

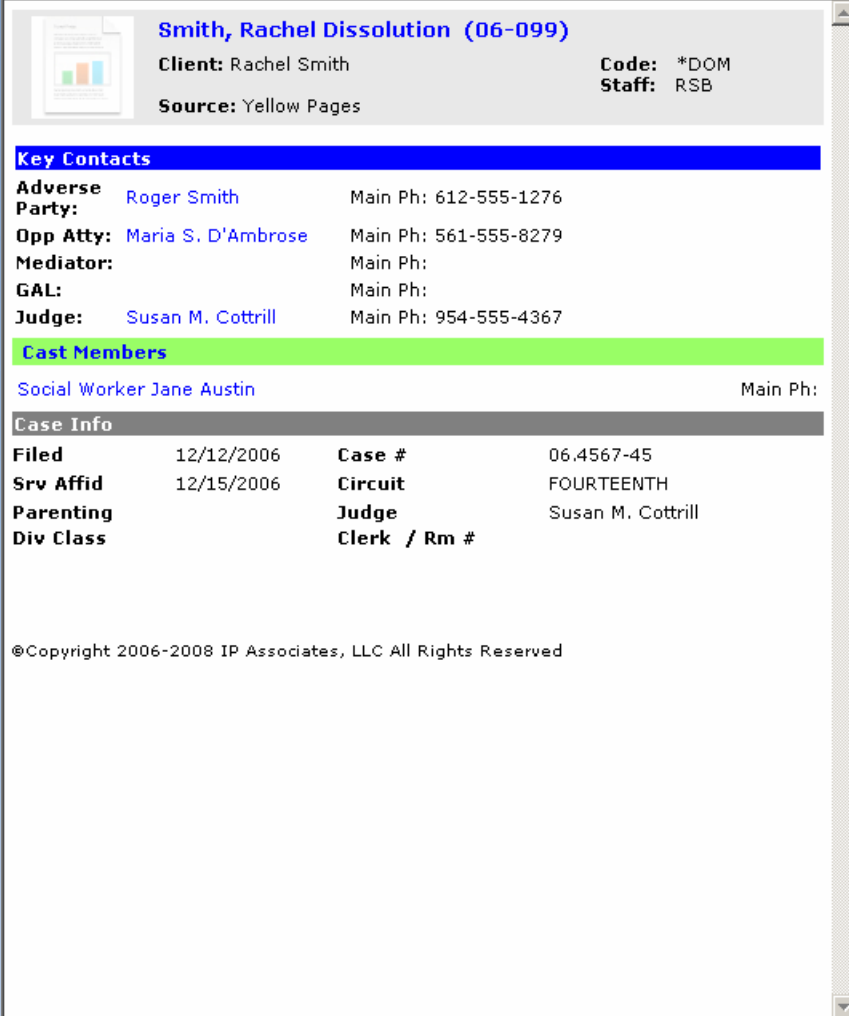
- Tired of looking in too many places for your critical case information?
 - IP Associates unique Power Views look inside the Matter for you and pull out the most critical information in one easy to understand view
 - Get quick access to all case documents, tasks that are yet to be completed, negotiations with the other side, and more – it's easy to stay on top of each case as it progresses!
 - Nearly two dozen custom Power Views are included with the Domestic Practice Area Template

DOMESTIC CASE SYNOPSIS

The Domestic Case Synopsis Power View displays the most critical information in one easy to read screen. All of the key contacts as well as others who play a role in the case are displayed along with easy links back to the full Contact record. Key case data is only a click away!

Looking for a phone number? It's here.

Need to send an email? Just click on the email link on the Power View.



The screenshot shows a web interface for a domestic case synopsis. At the top, there is a header for "Smith, Rachel Dissolution (06-099)". Below this, client and source information is provided: "Client: Rachel Smith" and "Source: Yellow Pages". To the right, "Code: *DOM" and "Staff: RSB" are listed. A "Key Contacts" section follows, listing "Adverse Party: Roger Smith" (Main Ph: 612-555-1276), "Opp Atty: Maria S. D'Ambrose" (Main Ph: 561-555-8279), "Mediator:" (Main Ph:), "GAL:" (Main Ph:), and "Judge: Susan M. Cottrill" (Main Ph: 954-555-4367). A "Cast Members" section lists "Social Worker Jane Austin" (Main Ph:). Below this is a "Case Info" table with the following data:

Case Info			
Filed	12/12/2006	Case #	06.4567-45
Srv Affid	12/15/2006	Circuit	FOURTEENTH
Parenting		Judge	Susan M. Cottrill
Div Class		Clerk / Rm #	

At the bottom of the interface, a copyright notice reads: "©Copyright 2006-2008 IP Associates, LLC All Rights Reserved".

ADDITIONAL POWER VIEWS

Other Power Views that greatly increase productivity for a Domestic practice are:

- Docs – All: Shows all documents linked to the case, with one click access to the actual file
- Docs Due Back: View a list of any documents for which you expect a response but have not been answered
- Events-ToDos: Easily see all of calendar and task records, with highlighting for ToDos not yet done!
- Negotiations Summary: See every negotiation phone call and get a complete picture of the offers and demands to date.

CAST MEMBERS

- Having trouble keeping track of everyone involved in the case?
 - Cast Member records provide a place to record each person's role in a case
 - Ever need to see how a judge ruled in previous cases you've had? Cast records allow you to track and find this easily!
 - Want to see how many times you've used an expert witness and what their opinions were on previous cases? Again, Cast records to the rescue!

“SOCIAL WORKER” CAST MEMBER

This Social Worker record is an example of Cast Member. It tracks this person’s unique relationship to this case. Have they issued a report? Have they been deposed by us? Who’s side are they on? What was their opinion?

The screenshot shows a software window titled "Cast Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar with icons for Save & Close, Save, navigation, and Cancel. The form is divided into several sections:

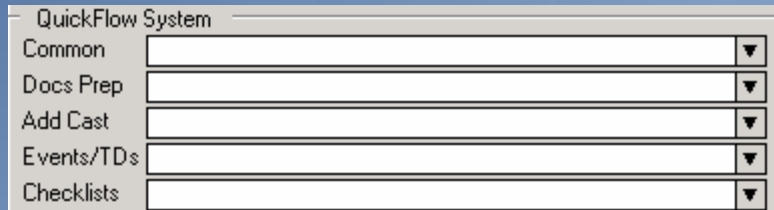
- Primary / Related / Notes:** Includes fields for Date (5/22/2008), Time (3:05pm), Code (.SOC|Social Workr), Description (Social Worker Jane Austin), Staff (RSB|Robert S Brown), and Regarding (Smith, Rachel Dissolution).
- Reminders:** A row of checkboxes for Follow, Done, Notify, Trigger, Review, and Private.
- Physical Address:** Fields for Name (Jane Austin), Agency (Child Protective Services), Address (123 4th Street, Room 205), City (Chicago), IL, and 60000.
- Treatment/Testimony:** Fields for Who's Side, Interest, Report (Yes), and Depo (No).
- Records Info:** A large empty text area for notes.

A vertical "Cast" label is visible on the right side of the window.

WORKFLOW & AUTOMATION

- Too many clicks and too much typing to perform one simple task?
 - Our QuickFlow System provides quick and easy access to commonly performed tasks, like creation of letters, delegating ToDos, adding Cast Members, and creating checklists – all in one easy-to-access place!
 - QuickFlow creates records in seconds, not minutes.
 - Less typing = More production
 - Automation = Consistency & speed

QUICKFLOW SYSTEM



QuickFlow System	
Common	▼
Docs Prep	▼
Add Cast	▼
Events/TDs	▼
Checklists	▼

The QuickFlow System Area provides access to commonly performed, often repetitious, functions. With QuickFlow, they are performed faster, with fewer clicks and with less typing.

The Domestic QuickFlow does all of the following, and more:

Common – Performs common functions like delegating a ToDo, adding a negotiation phone call, and creating standard letters and faxes.

Docs Prep – Draft a variety of useful documents, always pulling the most current information on the linked contacts. Your own templates are easily added to the list.

Cast – Add Cast Members records to the case such as Experts, Attorneys, Social Workers, etc.

DOCS PREP QUICKFLOW

The Docs Prep drop-down in Domestic QuickFlow gives you the following letter templates and placeholders for your own templates for other documents commonly prepared.

Since QuickFlow doesn't care whether they are Merge Templates (Word or WordPerfect), Formattable Clipboards (a special feature of Time Matters[®], or HotDocs[®], this is the simplest way for users to create documents.

```
*****Correspondence/Letters*****  
Letter to Court Commissioner  
Letter to GAL  
Letter to Mediator  
Letter to Opposing Counsel  
Letter to Referring Contact  
  
*****Documents*****  
Appearance (Respondent only)  
Appearance Fee (Respondent Only)  
Certificate of Dissolution (Half sheet)  
Disclosure  
Filing Fee  
Judgment of Dissolution  
Marital Settlement Agreement  
Notice of Prove Up Date  
Order of default Stipulation  
Petition for Dissolution  
Prove Up Questions  
Summons  
waiver of separation (both--if less than two years)  
waiver of service and Appearance (Optional)
```

COMMON FEATURES OF IP ASSOCIATES TEMPLATES

Every Practice Template includes a number of standard features, including:

- Document management, tracking and auto-naming system
- ToDo Delegation system
- Over two dozen custom Power Views
- Quick Tabs that aid in filtering and tracking of records
- A common look and feel to the matter/case forms
- The QuickFlow System for automation of common tasks

To see a discussion of all the common features to our templates, please browse to the “Common Features to Our Templates” PDF on our site, or visit www.ipassoc.com/commonfeatures.htm. These features are key components and significantly enhance the usefulness of our templates.

PRICING

- Pricing is based on the number of TM/PA user licenses
- Licensing one-to-one with TM/PA users
- \$400 for the 1st TM user license
- \$75 for each additional user license
- Multiple template purchases provide discounts on each additional template; *Example, if 5 Practice Areas with 10 TM licenses \$2,000 for 1st user (5 x \$400) + \$75 x 9 additional users = \$2,675.00*

HOW TO ORDER

- Through your local Certified Independent Consultant (CIC)
- Online at www.ipassoc.com/domesticorder.htm
- If ordering more than one template, go to www.ipassoc.com/practicetemplatesorder.htm
- Call 888-732-9071
- Download order form and fax to 866-258-9062

FOR MORE INFORMATION

IP Associates, LLC

5002 Mesa Court

Waterford, WI 53185

888-732-9071 Tel.

866-258-9062 Fax

<http://www.ipassoc.com>

info@ipassoc.com