

INSURANCE DEFENSE 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?*

INSURANCE DEFENSE 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.

Matter Form - Change

File Edit View Process Help

Save & Close Save [Icons] Cancel ?

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

MatterRef **Smith, Roger v. State Farm** Code -ID|Ins Defense

MatterNo 07-1259 Venue COOK Staff RSB,MCC

Stage Pre-Suit Status Dt 4/03/2008

Ins Carrier Roger Smith 031 Notify Trigger Review Billable Private Status Open

Billing Contact

Bill Contact Rachel Smith

Firm

Address 45 E. 9th St

City Altoona IL 65165

Tel/Fax 842-555-8419

QuickFlow System

Common

Docs Prep

Cast

Events,TDs

Other

Key Dates & Info

DOI 7/14/2007

Received 2/14/2008

Date Filed

Ack Ltr

Claim #s 7/14/2009

SOL Dates

Key Contacts & Info

Adjuster Therelius Baxter

Def't 1 Catherine P. Bennett

Def't 2

Insrd Cont

Opp Atty's Esther C. Kahn

Plaintiff's

Links & Referral

Docs Folder Roger\StateFarm

Email Subj Smith, Roger v. State Farm

Ref Src Attorney Referral

Ref By Gellman, Richard L. 20

Case Info

Case # 07 FL1234

District SIXTEENTH

Judge Harry Smithson

Clerk

Rm#, Tr Dat 1234

Mediation

Matters

INSURANCE DEFENSE FORM

Secondary Tab

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

- Primary / Secondary / Additional / Custom / Related / Notes / Documents / Phone / Email / Mail / Lexis / Billing / Timeline** (Navigation tabs)
- MatterRef:** Smith, Roger v. State Farm (highlighted in yellow)
- Code:** -ID|Ins Defense
- MatterNo:** 07-1259
- Venue:** COOK
- Staff:** RSB,MCC
- Stage:** Pre-Suit
- Status Dt:** 4/03/2008
- Ins Carrier:** Roger Smith | 031
- Notify:** **Trigger:** **Review:** **Billable:** **Private:** **Status:** Open
- Add'l Def'ts/Pltfs:**
 - Plaintiff 3:** Sally Mullins
 - Plaintiff 4:** (empty)
- Def't 3/CL#:** (empty)
- Def't 4/CL#:** (empty)
- Summary | Goals:**

Our client was broadsided by a FDOT vehicle and was rammed into the fencing around Niles Garden Center at the corner of Elm and Wood. client sustained multiple injuries to head, back, and left side. It is believed the FDOT driver was under the influence; blood tests were inconclusive.

The Secondary tab leaves you plenty of room to add your own fields.

It also includes a large free form Memo field to store extensive notes about the file.

INSURANCE DEFENSE FORM

Additional Tab

The Additional tab leaves you plenty room to expand with your own unique fields.

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

The screenshot shows the 'Matter Form - Change' application window. The 'Additional' tab is selected, and the form contains the following data:

MatterRef	Smith, Roger v. State Farm	Code	-ID Ins Defense
MatterNo	07-1259	Venue	COOK
Stage	Pre-Suit	Status Dt	4/03/2008
Ins Carrier	Roger Smith	031	<input type="checkbox"/> Notify <input type="checkbox"/> Trigger <input type="checkbox"/> Review <input type="checkbox"/> Billable <input type="checkbox"/> Private Status Open

Settlements Area

Settl't Amt	\$1,400.00
Exposure	\$1,000.00
Reduction	\$-400.00
% Reduct	0.40

Closure Info

Close Date	6/10/2008
Imaged?	Yes
Conclusion	Motion to Dismiss
Who Won?	Our Client
Destroy	7/05/2008
Loc Bin	

Matters - Additional

CRITICAL INFORMATION AT A GLANCE

- Tired of looking in too many places for your critical matter 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 matter documents, tasks that are yet to be completed, negotiations with the other side, and more – it's easy to stay on top of each matter as it progresses!
 - Nearly two dozen custom Power Views are included with the Insurance Defense Practice Area Template

INSURANCE DEFENSE MATTER SYNOPSIS

The Insurance Defense Synopsis Power View displays the most critical information in one easy to read screen. All of the key contacts 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.

Smith, Roger v. State Farm (07-1259)
Code: -ID
Staff: RSB,MCC

Client: Roger Smith
Primary Contact: Rachel Smith 842-555-8419

Search
 Print

Key Contacts

Code	Name	Main	Email
CLNT	Therelius Baxter	919-555-7455	thad@lawdemo.com
ATTY	Catherine P. Bennett	305-555-1702	cpb@ipassoc.com
REFE	Richard L. Gellman	954-555-8954	
ADJU	Esther C. Kahn	578-555-5678	
CLNT	Rachel Smith	842-555-8419	
CLNT	Roger Smith	612-555-1276	
CLNT	Harry Smithson	305-555-1254	

Cast Members

Cast Name	Role on Matter	Main Tel
Diane P. Abraham	Attorney for Roger Smith	305-555-1702
Lawrence Bernstein	CC Lawrence Bernstein	414.555.1215
Vanessa Clark	CC Vanessa Clark	313.537.8622
Gino Augustino	CC **NAME**	305-555-7309

Case Info

DOI	7/14/2007	Case #	07 FL1234
Received	2/14/2008	District	SIXTEENTH
Date Filed		Judge	Harry Smithson
Ack Ltr		Clerk	
Claim #s	123434778,	Rm#, Tr Dat	1234
SOL Dates			

Case Summary

ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the matter, with one click access to the actual file. “Documents” can include meeting minutes, scanned copies of executed documents, financial statements – anything that can be saved as a file!
- Docs Due Back: View a list of any documents for which you expect a response but have not been returned
- Events-ToDos: Easily see all of calendar and task records, with highlighting for ToDos not yet done!
- Cast Members: All the additional interested parties, such as officers, assets, bankers, lenders, etc.

CAST MEMBERS

- Having trouble keeping track of everyone involved in the matter?
 - Cast Member records provide a place to record each person's role in a matter
 - Easily track persons that play a role on a matter but aren't always used, such as officers, directors, vendors, partners, various agents, etc.

“Expert” CAST MEMBER

This Expert is an example of Cast Member. It keeps track of all experts related to this matter. Any details regarding this expert can be put in this record.

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

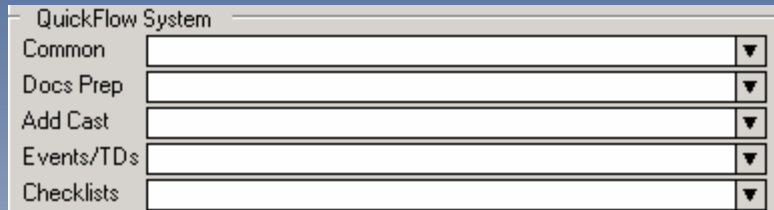
- Primary / Related / Notes**: Navigation tabs.
- Date**: 12/31/2008, Wed Time: 1:29pm, Code: .EXPIExpert.
- Description**: Expert (Ours) re: **SPECIALTY**.
- Regarding**: Smith, Roger v. State Farm, 07-1259, Roger Smith, 031.
- Reminders**: Follow, Done, Notify, Trigger, Review, Private, Status.
- Physical Address**: Name (highlighted in yellow), Contact, Address, City, Tel/Fax.
- Additional Info**: Email.
- Treatment/Testimony**: Who's Side (Ours - Plaintiff), Specialty (Specialty List).
- Report**: Yes, 12/31/2008.
- Depo**: Yes.
- Diagnosis/Opinion**: Large empty text area.

A vertical blue bar on the right side of the window is labeled "Cast".

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



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 Insurance Defense 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 Member records to the matter such as Experts, Attorneys, Judge, etc.

Checklists – Easily track all the tasks and documents necessary to complete a Insurance Defense transaction or track annual meetings.

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
- Call 888-732-9071
- Download order form and fax to 866-258-9062

FOR MORE INFORMATION

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