

**LITIGATION
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?*

LITIGATION 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 Cancel

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

MatterRef: Arthur v. St of Florida Code: -LIT|Litigation

MatterNo: 523488 Venue: Venue 1 Staff: RSB|Robert S Brown

Stage: Trial Update Dt: 5/28/2008

Client: Betty Arthur 004 Notify Trigger Review Billable Private Status: Open

Primary Contact

Pri Contact: Betty Arthur

Firm:

Address: 18907 NE 42nd Avenue

Address 2:

City: Miami Springs FL 33127

Tel/Fax: 305-555-9033

QuickFlow System

Common: [Dropdown]

Docs Prep: [Dropdown]

Cast: [Dropdown]

Events, TDs: [Dropdown]

Checklists: [Dropdown]

Key Dates & Info

DOI: 6/09/2006

Opened: 6/09/2008

Filed: 7/01/2006

Served: 8/15/2006

SOL Dates: 6/10/2011 6/15/2013

Key Contacts & Info

Our Side: Plaintiff

Adjuster: Anthony R. Damigella

Opp Atty: Diane P. Abraham

Def 1: Illinois Dept of Transportation

Def 2: [Dropdown] More in Cast

Links & Referral

Docs Folder: Arthur, Betty\Florida

Ref Src: Attorney Referral

Ref By: Meeks, Carolyn

Case Info

Case #: 06v.548

Circuit: THIRTEENTH

Judge: Pamela Norinsky

Clerk: Nancy

Rm #: 45B

LITIGATION FORM

Secondary Tab

Matter Form - Change

File Edit View Process Help

Save & Close Save [Navigation Icons] Cancel [Calendar Icon]

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

MatterRef **Arthur v. St of Florida** Code -LITLitigation

MatterNo 523488 Venue Venue 1 Staff RSBRobert S Brown

Stage Trial Update Dt 5/28/2008

Client Betty Arthur 004 Notify Trigger Review Billable Private Status **Open**

General Notes

Matters - Secondary

The Secondary tab leaves you plenty of room to add your own fields and includes a large free form Memo field to input the details of the incident giving rise to the case, a strategy for winning the case, and/or details of injuries to your client.

LITIGATION FORM

Additional Tab

The Additional tab contains plenty of space to add your own unique fields.

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

The screenshot shows a software window titled "Matter Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. Below the toolbar are tabs for "Primary", "Secondary", "Additional", "Custom", "Related", "Notes", "Documents", "Phone", "Email", "Mail", "Lexis", "Billing", "Timeline", and "AR". The "Additional" tab is active, displaying a form for "Arthur v. St of Florida".

Form fields include:

- MatterRef: Arthur v. St of Florida
- Code: -LITLitigation
- MatterNo: 523488
- Venue: Venue 1
- Staff: RSB|Robert S Brown
- Stage: Trial
- Update Dt: 5/28/2008
- Client: Betty Arthur
- 004
- Notify:
- Trigger:
- Review:
- Billable:
- Private:
- Status: Open

The "Closure Info" section at the bottom includes:

- Close Date: [Date Picker]
- Imaged?: [Dropdown]
- Conclusion: [Dropdown]
- Who Won?: [Dropdown]
- Destroy: [Date Picker]
- Loc | Bin: [Text Fields]

A vertical label "Matters - Additional" is visible on the right side of the window.

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 Case 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 Litigation Practice Area Template

LITIGATION CASE SYNOPSIS

The Litigation Case 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. Best of all, damages are shown by category and in total. 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.



Arthur v. St of Florida (523488)
Client: Betty Arthur
Source: Attorney Referral Meeks, Carolyn

Code: -LIT
Staff: RSB

Key Contacts

Adjr:	Anthony R. Damigella	Main Ph: 954-555-7127	tonyd@ipassoc.com
Opp Atty:	Diane P. Abraham	Main Ph: 305-555-1702	dianea@ipassoc.com
Def't 1:	Illinois Dept of Transportation	Main Ph: 800-555-1212	
Def't 2:		Main Ph:	
Judge:	Pamela Norinsky	Main Ph: 561-555-0203	

Cast Members

Expert William Alright	Main Ph: 801-555-1234
Judge Bob Butler	Main Ph: 305-555-9888
Expert - Crime Scenes - Walter Sufouri	Main Ph: 212-555-6548

Case Info

DOI	6/09/2006	Case #	06v.548
Opened	6/09/2008	Circuit	THIRTEENTH
Filed	7/01/2006	Judge	Pamela Norinsky
Served	8/15/2006	Clerk	Nancy
SOL Dates	6/10/2011 6/15/2013	Rm #	45B

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ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the case, with one click access to the actual file. “Documents” can include evidentiary photos, scanned pleadings, deposition transcripts – 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 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.

SERVICE LIST VIEW

The Service List Power View makes it easy and fast to print a current service list for inclusion with court documents. No need to continuously update a word processing document when attorneys are added or removed from a case. You'll always have the most up-to-date contact info as well!

Service List

Able v. State of Florida
Court No.: 07 FL1234

Carolyn Meeks
Brody Law Firm
11890 Old Dixie Highway Suite 890
West Palm Beach, FL 33401
Tel:561-555-4543
Fax:561-555-4898
Attorney for Defendant Jones

Walter S. Pierce
Law Offices of Walter Pierce
105 East Ponce de Leon Ave.
Minneapolis, MN 67439
Tel:612-555-3367
Fax:612-555-3409
Attorney for Defendant Florida DOT

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!

“EXPERT” CAST MEMBER

This Expert record is an example of Cast Member. It tracks this expert's unique relationship to this case. Has the expert issued a report? Have they been deposed by us? Who's side are they on? What was their opinion/diagnosis?

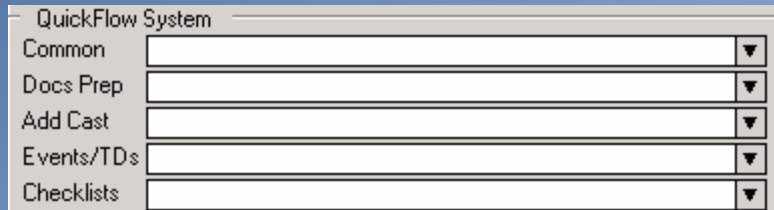
The screenshot shows a software window titled "Cast Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The form is divided into several sections:

- Primary / Related / Notes**: Navigation tabs.
- Date**: 2/02/2008, Sat, Time: 2:54pm, Code: .EXPIExpert.
- Description**: Expert for Defense regarding amputations.
- Regarding**: Able v. State of Florida, 07-1255, Barry B. Able, 001.
- Reminders**: Follow, Done, Notify, Trigger, Review, Private, Status.
- Physical Address**:
 - Name: Gino Augustino
 - Contact: Martin, Jones, Sawyer, et al.
 - Address: 500 N. Krome Avenue
 - City: Homestead, FL, 33030
 - Tel/Fax: 305-555-7309, 305-555-4562
 - Additional Info: Email
- Treatment/Testimony**:
 - Who's Side: Adverse - Defense
 - Specialty: Amputations
 - Report: Yes
 - Depo: Yes, 7/09/2007
- Records Info**: Dr. Augustino contends that the right foot of Barry was so severely damaged that it had to be amputated immediately and was done so to save his entire leg.

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 Litigation 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, such as medical records requests, letters to opposing counsel, etc. Your own templates are easily added to the list.

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

Checklists – Discovery and Scheduling Order checklists make it easy to track the key dates, documents and tasks associated with these processes.

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

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