

# The Case Computing Personal Injury TM Feature Package

The Personal injury package was designed to meet the special needs of the Canadian PI lawyer.

Based upon the powerful information management program, Time Matters, this feature package provides a comprehensive list of functions designed specifically for your personal injury cases.

It would be very difficult to list all the features of this specialized package, but this brochure will attempt to discuss a few of them.

## Comprehensive Contact Management

We start with specialized Contact forms, where we enter information about a new client your firm wishes to serve. All important client information can be entered here, and because the forms are customizable, you can add any type of additional information that you require to the form as well.

An additional tab, stores other info about your contacts, if necessary

There are specialized contact forms for lawyers, experts, vendors, etc..

A special intake feature allows you to store info about prospective clients

Information stored in a contact record can be used to generate documents, mailing lists, and update matter information. With over 160 fields available for client information, you will have easy access to client info

# Powerful Matter Management

After you have entered your important contact information, it is time to start a new matter. A matter is linked to your new contact and has the ability to store important information about the work you are doing for your client. The matter form is really the heart of the personal injury feature package, where all important matter related information is stored.

The screenshot shows a software window titled 'Matters' with a menu bar (File, Edit, View, Help) and a toolbar. The main area is a form for a matter titled 'Able vs. Powell'. The form is organized into several sections: 'Primary' (Matter No: 05-0010, Registry: NANAIMO, Staff: MCPIMark C Powell), 'Main Contact' (Client: Mark C. Powell, Firm: Case Computing Services Inc, Address: 3548 Verner Avenue, RR 2 - PO Box 6, Cobble Hill, BC, V0R 1L0, Tel/Email: 250-743-1288, mpowell@casecomputing.com), 'Defendant / Counsel' (Opp Couns1: Derek Ashurst - 250-477-4143, DC1 Client: Barry Able - 612-555-9210, DC1 Email: derek@salmondashurst.com, DC1 Assist: Robert Salmond - 250-477-4143, Diane Abraham - 305-555-1702, DC2 EmAst: robert@salmondashurst.com), 'Preliminary Info' (Matter No: 05-0010, PI Type: Soft Tissue, Intake: Intake Information Processed on 7/5/11 by TM, Res Lawyer: Derek E Ashurst, File Dprn/Cls: 11/26/2005, ClsFile#/Loc: ), and 'Important Dates' (DOI: 8/21/2005, Location: Corner of Cambie and Broad, Vancouver, Next Cit Dt: 10/23/2008, NCD Details: Jury Trial Chain, XFD/M/d Dt: 11/12/2006, 11/15/2006, PTC/Trial: 11/17/2006). A 'Save and Close' tooltip is visible over the 'Save & Close' button in the toolbar.

Store notes, documents, phone calls, email and internet research for matters

Matters are linked to contact records for the purposes of tracking and mgmt.

The Dates area stores important info about court and process dates

Powerful ToDo and event generation occurs through the use of todo chains

Every file that is created, can also store important documents, phone calls, emails, internet research and almost any other kind of information that you need to track.

In addition, all fields in a matter can be used to generate complex documents automatically.

The screenshot shows a dialog box titled 'Select AutoEntry Form'. It has a 'Show' button, a dropdown menu set to 'Program and User Level', and 'Select', 'Close', and '?' buttons. The main area is a tree view showing a hierarchy of document templates. The root is 'Document AutoEntry Forms', which branches into 'All (General Documents)' and 'Court Documents'. Under 'All (General Documents)', there are items like 'Fax to Contact', 'Letter', and 'Personal Injury Intake Form (C)'. Under 'Court Documents', there are items like 'Form 001 - Writ of Summons', 'Form 002 - Requisition', 'Form 003 - Petition', 'Form 006 - Endorsement for Service Outside of BC', 'Form 013 - Statement of Claim', 'Form 016 - Notice to Defendant by Counterclaim', 'Form 017 - Third Party Notice', 'Form 018 - Reply', and 'Form 019 - Statement of Defense to Counterclaim'.

This is an example of how documents can be organized to generate from TM

# Customized Powerviews Provide an Amazing View

Powerviews are special viewers that allow you to see what is inside of a matter from a list of available matters.

The screenshot shows a software interface for legal matters. On the left is a list of matters. The main window displays a detailed view for 'Able vs. Powell (05-0010)'. This view is customized to show:

- Parties:** A table listing individuals like Jeremy L. Baird and Gino Augustino with their roles (EXPE, WITN) and contact information.
- Notes:** A chronological list of notes from 1/14/2009 to 10/24/2006, such as 'Note to File re: Client' and 'Talked to Barry about missing arm'.
- Docs:** A list of documents with dates and descriptions, including 'receipt for chiropractor' and 'Writ of Summons'.
- Phone:** A list of phone calls with dates and descriptions, such as 'Call To Client' and 'phone call to Bob'.
- Email:** A list of email messages with dates and content, like 'please send me the docs we discussed'.

Powerviews can be customized to show you just the info that you desire to see

# Effective Calendaring and ToDo Lists

Time Matters also has a powerful calendaring system. This calendar system will allow you to track lawyer schedules as well as resources such as conference rooms and equipment. A powerful todo system will allow you to assign work to others and track their progress.

The screenshot shows a calendar application interface. The main view is for 'Tuesday, August 11, 2009'. It features:

- Events:** A calendar grid showing a single event: 'Interview with Bob Jones' at 9:00 AM.
- ToDo's:** A list of tasks for the day, such as 'Prepare, File and Draft NOM- Able vs. Powell' and 'Serve NOM and Supporting Materials- Able vs. Powell'.
- Reference Calendar:** A small calendar showing the current month (August 2009) and the next month (September 2009).
- Supporting Records:** A list of recent records, including '12:02am Incoming Call From POWELL, Mark C re: MVA'.
- Staff:** A list of staff members with checkboxes, including Alice Z Cooper, Betty A Smith, Dylan Hodge, Manny F Williams, Mark C Powell, Sally Smith, and Staff(G).

**ToDo's**

GoTo 8/10/2009 Filter All Records Power View CC Summary

All JB - Today JB - This Week JB - Next 30 Days My ToDo's - All Delegated To Me Delegated to Others Doc Requests

Date Due	Description	Priority
8/10/2009 Mon	Limitation - File before date	1
7/15/2010 Thu	Smith, John Assault	1

**Smith, John Assault** Print

**Deadline** Due: 7/15/2010 **Staff ID:** PL1 **Priority:** 1

<a href="#">Add Note</a>	<a href="#">Add ToDo</a>	<b>Client Name:</b>	<b>Deleg. By:</b>
<a href="#">Add Email</a>	<a href="#">Add Event</a>	Smith, John	<b>Assigned:</b> 17/07/2008
<a href="#">Add Phone</a>	<a href="#">Add Mail</a>	<b>Matter Reference:</b>	<b>Started:</b>
<a href="#">Add Docs</a>	<a href="#">Add CF</a>	Smith John re assault	<b>Status:</b>
<a href="#">Add Web</a>		08-0009	<b>Details:</b>

[View/Edit ToDo](#) [Add ToDo](#) [Add Doc Request](#)

**Memo**

### Document Management Built In

Time Matters also has a powerful document management system, which can store Microsoft Office documents, Adobe Acrobat files, and other kinds of documents for easy retrieval and use. These documents are stored under the matters you create for quick retrieval. Powerful document management features like document tracking and review are now readily available to you.

**Document Form - Add**

File Edit View Process Help

Save & Close Save Save & Copy Cancel

Primary Related Notes Documents Phone Email Web Billing Outline

Date 8/10/2009 Mon Time 4:45pm Code

Description Staff JBJoan Braun

Regarding

File Name C:\Data\TMFiles\\_20090810 Auto Name

Reminders Follow Done Notify Hide Trigger Review Billable Private Status

Doc No 1 Track Doc? Sent Date 8/10/2009 Due Date Received

Doc Review Review By

Memo Generate Versions Existing New File Clipboard Merge Scan HotDocs

Data Source Template

Select Record Type Contact

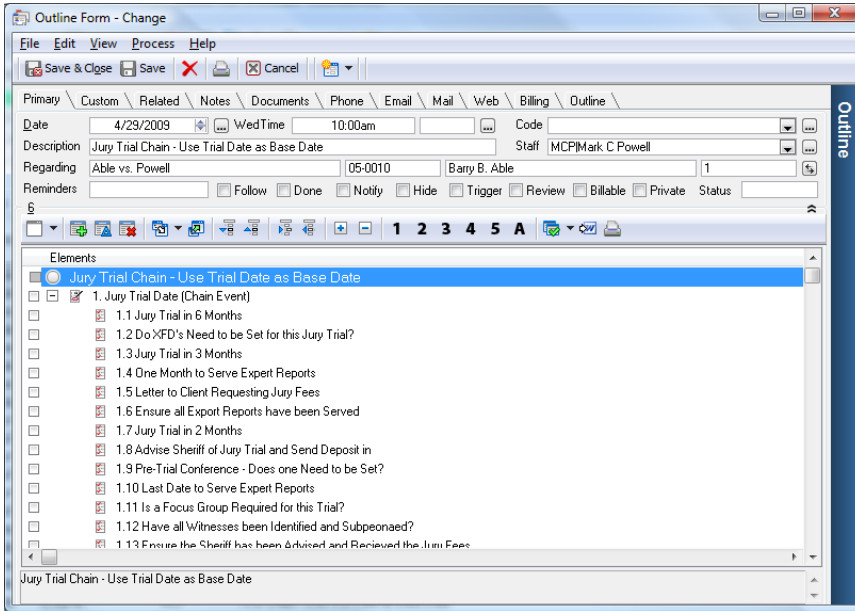
Add Remove

**Document Centre**

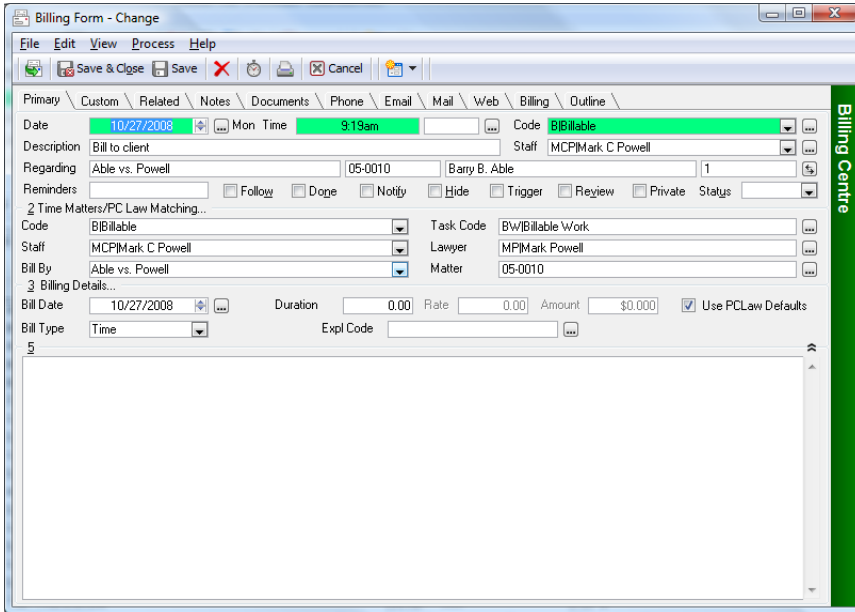
GoTo 8/10/2009 Filter All Records Power View CC Summary

All Ready Tracking Due Back CheckOut JB - All JB - Today JB - Last 30 Days For Review Review Complete

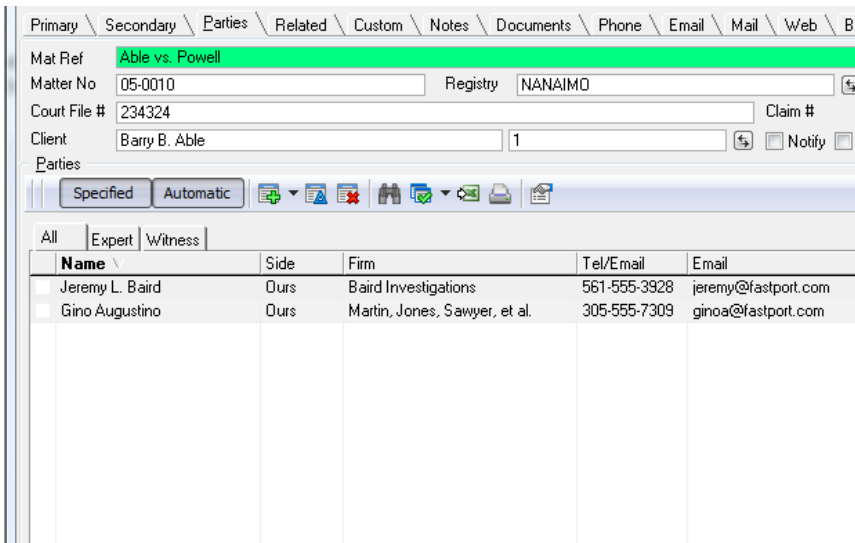
# Additional Features – Too Many to list



Outlines provide you with a powerful tool to follow a matter from start to finish



Accounting and Billing links allow you to bill time and manage accounting



A Parties tab to track witnesses, experts, and other people of interest

## **Other Features:**

- Multi User system using the powerful Microsoft SQL database.
- Powerful customizable reporting features, using built in report generation or free third party report generation utilities
- Fee calculation area on matter form
- Subpeona and document tracking capabilities
- Integration with Microsoft Office products like Word, Outlook , Excel, Powerpoint and others
- Integration with Adobe Acrobat
- Integration with popular accounting programs such as PCLaw, Juris, Quickbooks and others
- Completely customizable forms and fields
- Customized User Manual

## **Still not convinced?**

This software has too many features to display here.

Pricing is based upon the number of users and the level of customization that your organization requires. Please contact us for a demo and quote on this powerful software.

If you desire more information, please contact Case Computing at 604-357-7030, or email us at [info@casecomputing.com](mailto:info@casecomputing.com). We look forward to serving you.