

**CRIMINAL LAW  
PRACTICE AREA TEMPLATE**  
for Time Matters<sup>®</sup>/Total Practice Advantage<sup>®</sup>

By  
IP ASSOCIATES, LLC

# Free yourself...



...from the constraints of  
Time Matters for your  
criminal practice!

*If you feel that you are not using Time Matters to its full potential to keep track of your criminal cases, and wish that it worked more like you do, the Criminal Practice Area Template from IP Associates is the answer.*

*The Criminal Practice Area Template was designed to be an affordable and easy to use solution for firms of all sizes. Our template includes everything a firm needs to increase productivity and profitability through more effective use of Time Matters!*

# 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?*

# CRIMINAL 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, the key contacts related to the case via single-click lookups, the referral source, and the court information. Also, there is plenty of room to create your own fields, if there is other information you would like to track.

The screenshot shows the 'Matter Form - Change' application window. The 'Primary' tab is selected, displaying various fields for case management. The 'MatterRef' field is highlighted in yellow and contains 'de Bellefort, Jacqueline - Homicide'. Other fields include 'MatterNo' (08-0100), 'Court' (ALEXANDER), 'Stage' (Arrest), and 'Update Dt' (5/18/2008). The 'Client' field is 'Jacqueline de Bellefort'. The 'Primary Contact' section includes 'Pri Contact' (Jacqueline de Bellefort), 'Email', 'Address' (789 10th Avenue), 'City' (Cairo, IL, 60000), and 'HomeWork' (123-456-7890, 234-567-8901). The 'Important Contacts' section includes 'Prosecutor' (Hercule Poirot), 'Co-Def' (Simon Doyle), and 'Co-Def Atty' (Andrew Pennington). The 'App Links/Referral' section includes 'Ref Source' (Attorney Referral), 'Ref By' (Diane P. Abraham), and 'Docs Folder' (de Bellefort\Homicide). The 'Court Info' section includes 'Case #' (08-CRI-1000), 'Circuit', 'Judge' (James Fanthorpe), 'Clerk', and 'Rm #'. The 'Status' is set to 'Open'. The window title is 'Matter Form - Change' and the menu bar includes 'File', 'Edit', 'View', 'Process', and 'Help'. The toolbar includes 'Save & Close', 'Save', and 'Cancel'. The 'Matters' sidebar is visible on the right.

# CRIMINAL FORM Secondary Tab

The screenshot shows the 'Matter Form - Change' application window, specifically the 'Secondary' tab. 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', '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**: A set of tabs at the top, with 'Secondary' selected.
- MatterRef**: 'de Bellefort, Jacqueline - Homicide' (highlighted in yellow)
- Code**: 'CRIMCriminal' (dropdown)
- MatterNo**: '08-0100'
- Court**: 'ALEXANDER' (dropdown)
- Staff**: 'RSB|Robert S Brown' (dropdown)
- Stage**: 'Arrest' (dropdown)
- Update Dt**: '5/18/2008' (calendar icon)
- Client**: 'Jacqueline de Bellefort' (dropdown)
- Notify**:
- Trigger**:
- Review**:
- Billable**:
- Private**:
- Status**: 'Open' (dropdown)

**Charges**

Charge	Description	Date
Charge 1	1st Degree Intentional Homicide	1/01/2007
Charge 2		
Charge 3		
Charge 4		
Charge 5		
Charge 6		

**Charges (cont.)**

Charge	Date
Charge 4	
Charge 5	
Charge 6	

**DUI Info**

DUI Y/N	Susp Beg	Susp End	PTR

**Memo**

A large text area for entering a memo is located on the right side of the form.

- Up to six criminal charges and their dates can be tracked on this tab. As charges are typically entered when the case is opened, placing them on this tab leaves room on the Primary tab for more frequently updated information.
- For DUI type cases additional details can be entered here.
- A free form Memo field rounds out this tab.

# CRIMINAL FORM

## Additional Tab

This tab provides areas to track additional information about your client that may help in reducing the charges or sentence.

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. The "Additional" tab is selected, showing the following fields:

- MatterRef: de Bellefort, Jacqueline - Homicide
- MatterNo: 08-0100
- Court: ALEXANDER
- Code: 'CRI|Criminal'
- Staff: RSBI|Robert S Brown
- Stage: Arrest
- Update Dt: 5/18/2008
- Client: Jacqueline de Bellefort
- Notify, Trigger, Review, Billable, Private: unchecked
- Status: Open
- Mar Status: Single
- Children, Employer, Length, Education, Counseling: empty text boxes
- DoB, Age, Pri Prob, Pri States: empty text boxes
- Corr Inst: empty text box
- Case Closing Info:
  - Close Date: empty text box
  - Imaged?: empty dropdown
  - Concluded: empty dropdown
  - Who Won: empty dropdown
  - Destroy: empty text box
  - Loc | Bin: empty text box

# 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 Criminal Practice Area Template

# CRIMINAL CASE SYNOPSIS

The Criminal 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.

**de Bellefort, Jacqueline - Homicide (08-0100)**

**Client:** Jacqueline de Bellefort **Code:** 'CRI  
**Staff:** RSB  
**Source:** Attorney Referral Diane P. Abraham

**Key Contacts**

<b>Client Contact:</b>	Jacqueline de Bellefort	Main Ph: 123-456-7890	<a href="mailto:jeff@ipassoc.com">jeff@ipassoc.com</a>
<b>Prosecutor:</b>	Hercule Poirot	Main Ph: 890-123-4567	<a href="mailto:jeff@ipassoc.com">jeff@ipassoc.com</a>
<b>Co-Defendant:</b>	Simon Doyle	Main Ph: 234-567-8901	<a href="mailto:jeff@ipassoc.com">jeff@ipassoc.com</a>
<b>Co-Def't Atty:</b>	Andrew Pennington	Main Ph: 123-456-7890	<a href="mailto:jeff@ipassoc.com">jeff@ipassoc.com</a>
<b>Judge:</b>	James Fanthorpe	Main Ph: 123-456-7890	<a href="mailto:jeff@ipassoc.com">jeff@ipassoc.com</a>
<b>Clerk:</b>		Main Ph:	

**Cast Members**

Expert James Race - Forensics	Main Ph: 567-890-1234
District Attorney Hercule Poirot	Main Ph: 890-123-4567
Police Officer Carl Bessner	Main Ph: 123-456-7890

**Case Info**

<b>Charge 1</b>	1st Degree Intentional Homicide 1/01/2007	<b>Case #</b>	08-CRI-1000
<b>Charge 2</b>		<b>Court</b>	ALEXANDER
<b>Charge 3</b>		<b>Circuit</b>	
<b>Charge 4</b>		<b>Judge</b>	James Fanthorpe
<b>Charge 5</b>		<b>Clerk</b>	
<b>Charge 6</b>		<b>Rm #</b>	

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# ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the case, with one click access to the actual file. “Documents” can include crime scene photos, scanned medical records, recordings – 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.

# 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 with icons for Save & Close, Save, navigation, and Cancel. The form is divided into several sections:

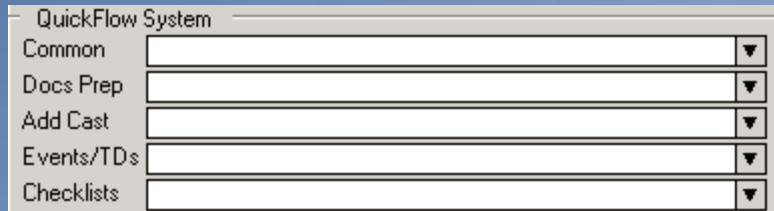
- Primary / Related / Notes**: A tabbed interface with "Primary" selected.
- Date**: 5/18/2008, Sun, Time: 6:10pm, Code: .EXPIExpert
- Description**: Expert James Race - Forensics, Staff: RSBI/Robert S Brown
- Regarding**: de Belfort, Jacqueline - Homicide, 08-0100, Jacqueline de Belfort
- Reminders**:  Follow,  Done,  Notify,  Trigger,  Review,  Private, Status: [ ]
- Physical Address**:
  - Name: James Race (highlighted in yellow)
  - Contact: [ ]
  - Address: 678 9th Street
  - City: Chicago, IL, 60001
  - Tel/Fax: 567-890-1234
  - Additional Info: [ ]
  - Email: jeff@ippassoc.com
- Treatment/Testimony**:
  - Who's Side: Ours - Defense
  - Specialty: Forensics
  - Report: No
  - Depo: No
- Records Info**: [ ]

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



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 Criminal 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. Over 35 criminal related templates are included which can be used as is or tweaked to meet your specific wording/formats.

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

# 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](http://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 1<sup>st</sup> 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 1<sup>st</sup> 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/criminalorder.htm](http://www.ipassoc.com/criminalorder.htm)
- If ordering more than one template, go to [www.ipassoc.com/practicetemplatesorder.htm](http://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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