

**GUARDIANSHIP
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?*

Guardianship Form Primary Tab

The Primary tab contains most of the key information about the matter. Easily keep track of the current stage of the matter, entity information, key dates such as formation date and fiscal year, and referral source.

The screenshot displays the 'Matter Form - Change' application window. The 'Primary' tab is selected, showing various fields for case information. The 'Matters' sidebar is visible on the right.

Matter Information	
MatterRef	Doe, Jane Guardianship
MatterNo	07-258
Venue	
Code	=GUA\Guardianship
Staff	MCC Marilyn C Campos
Stage	
Guardian	Jane Doe
Grd Reason	Independent Administration-Decedent
Notify	<input type="checkbox"/>
Trigger	<input type="checkbox"/>
Review	<input type="checkbox"/>
Billable	<input type="checkbox"/>
Private	<input type="checkbox"/>
Status	Open

Client Info	
Pri Contact	Arthur Andersen
Firm	Arthur Anderson
Address	1234 5th Street
	Suite 2000
City	Milwaukee WI 53202
Tel/Fax	312.555.2121

Guardianship Info	
Grd Type	Person
2nd Guard	
GAL	Bill Jones
Petitioner	Robert W. Baird
Ward	Bob Roe

QuickFlow System	
Common	
Docs Prep	
Cast	
Events, TDs	
Checklists	

Links & Referral	
Docs Folder	Doe, Jane\Guardianship
Email Subj	
Ref Src	Martindale
Ref By	

Key Dates & Info	
Appt Date	6/05/2007
Inv Due	
Ann Acct	
PauperPet	Yes
Institution'd	<input type="checkbox"/>

Case Info	
Case #	07G-53H213
Circuit	SEVENTEENTH
Judge	Susan M. Cottrill
Clerk	
Rm #	2813

Guardianship Form Secondary Tab

Matter Form - Change

File Edit View Process Help

Save & Close Save Cancel

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

Matters - Secondary

MatterRef: Doe, Jane Guardianship Code: =GUA|Guardianship

MatterNo: 07-258 Venue: Staff: MCC|Marilyn C Campos

Stage: Grd Reason: Independent Administration-Decedent

Guardian: Jane Doe Notify Trigger Review Billable Private Status: Open

Memo

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.

Guardianship 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 a software window titled "Matter Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The "Additional" tab is selected in the navigation pane. The form contains the following fields and values:

MatterRef	Doe, Jane Guardianship	Code	=GUA Guardianship
MatterNo	07-258	Venue	
Stage		Grd Reason	Independent Administration-Decedent
Guardian	Jane Doe	Notify	<input type="checkbox"/>
		Trigger	<input type="checkbox"/>
		Review	<input type="checkbox"/>
		Billable	<input type="checkbox"/>
		Private	<input type="checkbox"/>
		Status	Open

The "Closure Info" section includes:

Close Date	2/08/2010
Imaged?	Yes
Destroy	2/18/2010
Loc Bin	

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 Business Formations Practice Area Template

Guardianship Matter Synopsis

The Guardianship Matter 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 matter are displayed along with easy links back to the full Contact record. Key matter 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.

Doe, Jane Guardianship (07-258)
Code: =GUA
Staff: MCC

Print

QuickFlow -- Click Item to Add

Delegated ToDo	Case History Note	Negotiation Note	Case Alert
Client Letter Fax	Pri.Con. Letter Fax	Cast Letter Fax	

Key Contacts

Code	Name	Main	Email
	Jane Doe	312.555.1212	neij@pd-partners.com
BNKR	Robert W. Baird & Co.	414-123-4567	jeff@ipassoc.com
	Bill Jones	312.555.1516	neij@pd-partners.com
	Arthur Andersen	312.555.2121	art@aarip.com
	Bob Roosevelt	312.555.5555	bob@ipassoc.com
JUD	Susan M. Cotrill	954-555-4367	

Cast Members

Cast Name	Role on Matter	Main Tel
Bob Roosevelt	Social Worker Bob Roosevelt	312.555.5555
Judge Judy Brown	Judge Judy Brown	312.333-5432
Billy M. Jean	Witness Billy M. Jean	312.555.5757

Case Info

Appt Date	6/05/2007	Case #	07G-53H213
Inv Due		Circuit	SEVENTEENTH
Ann Acct		Judge	Susan M. Cotrill
Grd Type	Person	Clerk / Rm #	2813

Memo

ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the matter, with one click access to the actual file. “Documents” can include annual 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, shareholders, 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.

“Social Worker” CAST MEMBER

This Social Worker record is an example of Cast Member. It tracks this person’s unique relationship to this matter.

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

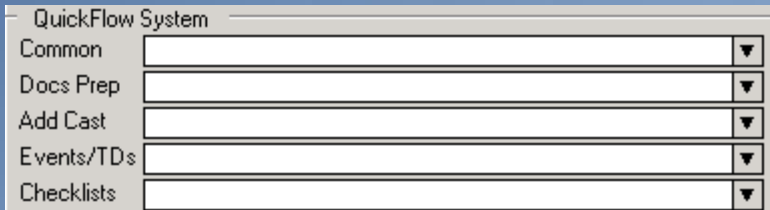
- Primary / Related / Notes**: Navigation tabs.
- Date**: 2/08/2010, Mon, Time: 4:04pm, Code: .SOCISocial Workr.
- Description**: Social Worker, Staff: [empty].
- Regarding**: Doe, Jane Guardianship, 07-258, Jane Doe.
- Reminders**: [empty], Follow, Done, Notify, Trigger, Review, Private, Status: [empty].
- Physical Address**:
 - Name**: William Carton (highlighted in yellow)
 - Agency**: Triangle Family Services
 - Address**: 120 Wake Rd
 - City**: Milwaukee, WI, 53202
 - Tel/Fax**: 312-555-4847
- Treatment/Testimony**:
 - Who's Side**: Ours - Plaintiff
 - Interest**: [empty]
 - Report**: Yes, 2/08/2010
 - Depo**: No
- Records Info**: [empty list 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



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 Guardianship 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 matter such as Shareholders, Attorneys, CPA, etc.

Checklists – Easily track all the tasks and documents necessary to complete a business formation 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/realestateorder.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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