

# INSURANCE DEFENSE PRACTICE AREA TEMPLATE

for Time Matters<sup>®</sup>/Total Practice  
Advantage<sup>®</sup>

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 [Navigation 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

**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:

**QuickFlow System**  
Common:  
Docs Prep:  
Cast:  
Events,TDs:  
Other:

**Links & Referral**  
Docs Folder: Roger\StateFarm  
Email Subj: Smith, Roger v. State Farm  
Ref Src: Attorney Referral  
Ref By: Gellman, Richard L. 20

**Key Dates & Info**  
DOI: 7/14/2007  
Received: 2/14/2008  
Date Filed:  
Ack Ltr:  
Claim #: 7/14/2009  
SQL Dates:

**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. The title bar reads 'Matter Form - Change'. The menu bar includes 'File', 'Edit', 'View', 'Process', and 'Help'. The toolbar contains 'Save & Close', 'Save', navigation arrows, and 'Cancel'. The tab bar shows 'Primary', 'Secondary' (selected), 'Additional', 'Custom', 'Related', 'Notes', 'Documents', 'Phone', 'Email', 'Mail', 'Lexis', 'Billing', and 'Timeline'. The form fields are as follows:

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 <b>Open</b>
Add'l Def'ts/Pltfs			
Plaintiff 3	Sally Mullins		
Plaintiff 4			
Def't 3/CL#			
Def't 4/CL#			
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 is populated with the following data:

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

# 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

Client: Roger Smith
Staff: RSB,MCC

Primary Contact: Rachel Smith 842-555-8419

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Key Contacts

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

Cast Members

Cast Name	Role on Matter	Main Tel
<a href="#">Diane P. Abraham</a>	Attorney for Roger Smith	305-555-1702
<a href="#">Lawrence Bernstein</a>	CC Lawrence Bernstein	414.555.1215
<a href="#">Vanessa Clark</a>	CC Vanessa Clark	313.537.8622
<a href="#">Gino Augustino</a>	CC **NAME**	305-555-7309

Case Info

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

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". The window has a menu bar with "File", "Edit", "View", "Process", and "Help". Below the menu bar is a toolbar with icons for "Save & Close", "Save", a printer, a calendar, a bell, a folder, a document, a trash can, and a question mark. The main area of the window is divided into several sections:

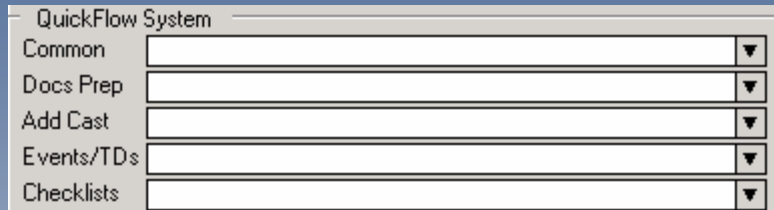
- Primary / Related / Notes**: A tabbed interface with "Primary" selected.
- Date**: A date picker set to "12/31/2008" and a time field set to "Wed Time 1:29pm".
- Description**: A text field containing "Expert (Ours) re: \*\*SPECIALTY\*\*".
- Regarding**: Fields for "Smith, Roger v. State Farm", "07-1259", "Roger Smith", and "031".
- Reminders**: A row of checkboxes for "Follow", "Done", "Notify", "Trigger", "Review", and "Private", followed by a "Status" field.
- Physical Address**: Fields for "Name", "Contact", "Address", "City", and "Tel/Fax". The "Name" field is highlighted in yellow.
- Additional Info**: An "Email" field.
- Treatment/Testimony**: Fields for "Who's Side" (set to "Ours - Plaintiff") and "Specialty" (set to "Specialty List").
- Report**: A dropdown set to "Yes" and a date field set to "12/31/2008".
- Depo**: A dropdown set to "Yes" and a date field.
- Diagnosis/Opinion**: A 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](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](http://www.ipassoc.com)
- Call 888-732-9071
- Download order form and fax to 866-258-9062

# FOR MORE INFORMATION

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