

**PERSONAL INJURY LAW  
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?*

# PERSONAL INJURY 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 [Icons] Cancel [Icon]

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

MatterRef: Able v. State of Florida Code: .PI\Pers Inj\*

MatterNo: 07-1255 Court: COOK Staff: RSB,MCC

Stage: Pre-Suit Last Upd: 5/21/2008

Client: Barry B. Able 001

Notify  Trigger  Review  Billable  Private Status: Open

**Primary Contact**

Pri Contact: Laurie P. Sawyer

Firm:

Address: 500 Newberry Drive

Address 2:

City: Perrine FL 33147

Tel/Fax: 305-555-0792 305-555-2413

**Key Contacts**

Defendant 1: Therellus Baxter

Attorney 1: Catherine P. Bennett

Defendant 2:

Attorney 2:

Adj & Clm 1: Esther C. Kahn 07IL-2837366

Adj & Clm 2:

**QuickFlow System**

Common:

Docs Prep:

Add Cast:

Events/TDs:

Checklists:

Damages:

**Key Dates**

Dt of Inj: 7/14/2007

1st Cont: 7/25/2007

Def 1 Srvd:

Def 2 Srvd:

SOL 1 & 2: 7/14/2009

**Links & Referral**

Docs Folder: Able\Florida

Ref Source: Attorney Referral

Refer | %: Gellman, Richard L. 20.0000

**Case Details**

Case #: 07 FL1234

District: SIXTEENTH

Judge: Harry Smithson

Clerk:

Rm#/Tr Dat: 1234

Mediator:

# PERSONAL INJURY FORM

## Secondary Tab

Matter Form - Change

File Edit View Process Help

Save & Close Save [Icons] Cancel [Icon]

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

MatterRef **Able v. State of Florida** Code .PI\*Pers Inj\*

MatterNo 07-1255 Court COOK Staff RSB,MCC

Stage Pre-Suit Last Upd 5/21/2008

Client Barry B. Able 001  Notify  Trigger  Review  Billable  Private Status **Open**

Incident Details

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.

Employment Info

Employer [Field]

Duties [Field]

Wages [Field]

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.

# PERSONAL INJURY FORM

## Additional Tab

This tab has Settlement and Fee calculators, where you can input “what-if” scenarios and final values at the end of the case to determine payouts and attorney’s fees.

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

Matter Form - Change

File Edit View Process Help

Save & Close Save Print Cancel Help

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

Matters - Additional

MatterRef: **Able v. State of Florida** Code: .PI\*Pers Inj\*

MatterNo: 07-1255 Court: COOK Staff: RSB,MCC

Stage: Pre-Suit Last Upd: 5/21/2008

Client: Barry B. Able 001  Notify  Trigger  Review  Billable  Private Status: **Open**

Settlement Calculator

Settle Amt: \$135,000.00

Fee %: 33.0000

Gross to Clnt: \$90,450.00

Costs: \$2,705.00

Liens: \$21,555.00

Net to Client: \$66,190.00

Fees Calculator

Gross Fees: \$44,550.00

Referral Fee: \$8,910.00

Net Fees: \$35,640.00

Appeal Info

Case #: \_\_\_\_\_

Court: \_\_\_\_\_

Deadline: \_\_\_\_\_

Closure Info

Close Date: \_\_\_\_\_

Imaged?: \_\_\_\_\_

Concluded: \_\_\_\_\_

Who Won: \_\_\_\_\_

Destroy: \_\_\_\_\_

Loc | Bin: \_\_\_\_\_

# 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 Personal Injury Practice Area Template

# PERSONAL INJURY CASE SYNOPSIS

The Personal Injury 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.



**Able v. State of Florida (07-1255)**  
**Case # : 07 FL1234**

**Stage** Pre-Suit  
**Client:** Barry B. Able  
**Primary Contact:** Laurie P. Sawyer 305-555-0792

**Code** -PI  
**Staff** RSB,MCC

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**Case Info**

<b>Dt of Inj</b>	7/14/2007	<b>Employer</b>	
<b>1st Cont</b>	7/25/2007	<b>Duties</b>	
<b>Def 1 Srvd</b>		<b>Wages</b>	
<b>Def 2 Srvd</b>			
<b>SOL 1 &amp; 2</b>	7/14/2009		

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**Key Case Contacts**

<b>Def't 1:</b>	<a href="#">Therelius Baxter</a>	919-555-7455	<a href="mailto:thad@lawdemo.com">thad@lawdemo.com</a>
<b>Atty 1:</b>	<a href="#">Catherine P. Bennett</a>	305-555-1702	<a href="mailto:cpb@ipassoc.com">cpb@ipassoc.com</a>
<b>Def't 2:</b>			
<b>Atty 2:</b>			
<b>Adj 1:</b>	<a href="#">Esther C. Kahn</a>	578-555-5678	
<b>Adj 2:</b>			
<b>Judge:</b>	<a href="#">Harry Smithson</a>	305-555-1254	
<b>Clerk:</b>			

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<b>Damages Totals</b>	<a href="#">Expand All</a>	<a href="#">Collapse All</a>
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	Amount	Lien Amt
<b>Totals for Medical Specials</b>	\$9,011.00	\$500.00
<b>Totals for Property Damages</b>	\$250.00	\$100.00
<b>Total Lost Wages</b>	\$22,222.00	
<b>TOTAL ALL DAMAGES</b>	\$31,483.00	\$600.00

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**Incident Details**

# ADDITIONAL POWER VIEWS

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

- Docs – All: Shows all documents linked to the case, with one click access to the actual file. “Documents” can include accident photos, scanned medical records, 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.
- Detailed Damages: See all Medical Specials, Property Damages, and Lost Wages with totals for each category and a grand total.



# DETAILED DAMAGES VIEW

This Power View allows you to instantly see all damages for the case, with totals by category and a grand total. This eliminates the need to track these in spreadsheets or other applications and aids in making quicker, more sound negotiations.



**Able v. State of Florida (07-1255)**

COOK  
Barry B. Able (001)

Code: -PI  
Staff: RSB,MCC

**Damages View**   **Add**   **Expand All**   **Collapse All**   **Print**

### Medical Specials

Date	Provider	Amount	Lien Amt
2/14/2008	<a href="#">Mercy Hospital</a>	\$3,456.00	\$250.00
2/14/2008	<a href="#">Mercy Hospital</a>	\$5,555.00	\$250.00
<b>Totals for Medical Specials</b>		<b>\$9,011.00</b>	<b>\$500.00</b>

### Property Damages

Date	Owner	Amount	Lien Amt
2/14/2008	<a href="#">Alexander Hotel</a>	\$250.00	\$100.00
<b>Totals for Property Damages</b>		<b>\$250.00</b>	<b>\$100.00</b>

### Lost Wages

Date	Employer	Amount	Lien Amt
2/14/2008	<a href="#">Arthur Andersen</a>	\$22,222.00	
<b>Total Lost Wages</b>		<b>\$22,222.00</b>	
<b>TOTAL ALL DAMAGES</b>		<b>\$31,483.00</b>	<b>\$600.00</b>

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# 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.

# DAMAGES & COSTS

Each medical provider, property owner, and employer can be tracked along with any associated medical specials, property damages, and lost wages.

You have the option of entering individual damages records for each treatment or one record that totals all damages for a provider.

Each damages record will appear on the Detailed Damages Power View as a separate line item, and all damages records will be grouped and totaled on the PI Case Synopsis Power View.

The Detailed Damages View can be printed for easy inclusion in a Settlement Report.

Costs can be tracked using Billing records and, optionally, sent to various accounting applications to eliminate duplicate entry and having the ability to easily see all costs associated with a case.

# DAMAGES

This Cast record doubles as a Medical Provider and a Medical Specials record. Treatment information is entered on the right side of the form, including treatment dates, total amount of specials and any liens on those amounts.

# INSURANCE POLICY INFO

The Insurance Policy record allows for input of key policy information that may impact the case settlement. Multiple policy records can be added.

The screenshot displays a software window titled "Practice Specific Form - Change". The window has a menu bar (File, Edit, View, Process, Help) and a toolbar with icons for Save & Close, Save, navigation, and Cancel. Below the toolbar are tabs for "Primary", "Related", and "Notes".

The form is divided into several sections:

- Date:** 3/01/2008 (Sat), Time: 12:08pm, Code: POLInsur Policy
- Description:** Insurance Policy
- Regarding:** Able v. State of Florida, 07-1255, Barry B. Able, 001
- Reminders:** Follow, Done, Notify, Trigger, Review, Private, Status
- Policy Info:**
  - Name of Ins: Barry B. Able
  - Ins Comp: Mountain Insurance Company
- Policy Details:**
  - Period: Jan 07 to Dec 08
  - Primry Limits: \$500,000.00
  - Exces Limits: \$1,000,000.00
  - DD/UU: (empty)
  - Clm/Pol #s: 07-54848885, M2458-59889
  - UM/UIM \$: \$100,000.00, \$100,000.00
  - Erosion: Non-eroding
  - SIR: No
- Policy Notes:** (empty text area)

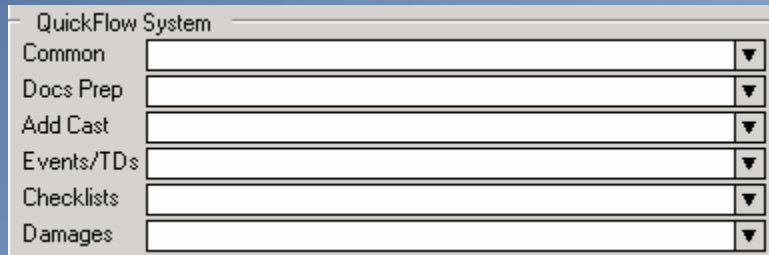
A vertical blue bar on the right side of the window is labeled "Practice Specific".

# 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	▼
Damages	▼

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 Personal Injury 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.

**Damages** – Add medical specials, property damages, and lost wages.

# 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/domesticorder.htm](http://www.ipassoc.com/domesticorder.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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