

**WORKERS' COMP 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?*

# WORKERS' COMP 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 Cancel

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

MatterRef: **Goodrich, Sarah v. Alexander Hotel** Code: -WC/WorkComp

MatterNo: 08-019 Venue: COOK Staff: JSK/Jeffrey S Krause

Stage: Continued Status Dt: 2/15/2008

Client: Sarah Goodrich

Notify Trigger Review Billable Private Status: Open

**Primary Contact**

Pri Contact: Sarah Goodrich

Firm:

Address: 3948 Red Hill Drive

Address 2:

City: San Francisco CA 94109

Tel/Fax: 415-555-8964

**Key Contacts & Info**

Ins/TPA: Mountain Insurance

Adjuster: Jonathan Smythe

Employer: Alexander Hotel

OppAtty: Walter S. Pierce

Firm:

**QuickFlow System**

Common

Docs Prep

Cast

Events,TDs

Checklists

**Links & Referral**

Docs Folder: **Goodrich, Sarah 08-019**

Ref Src: Attorney Referral

Ref By: Meeks, Carolyn

**Key Dates & Info**

DOI: 2/07/2007

Last Work: 2/08/2007

RTW Date:

App Date: 6/08/2007

Claim #s: 07-31987

SDL Dates: 2/07/2009

**Case Info**

Case #: 07-WC 28765

WC Comm: Susan M. Cottrill

Status Date: 6/05/2008

Trial Date: 7/05/2008

Cir Ct #:

App I Sup:

# WORKERS' COMP FORM

## Secondary Tab

**Matter Form - Change**

File Edit View Process Help

Save & Close Save Cancel

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

MatterRef: **Goodrich, Sarah v. Alexander Hotel** Code: -WCWorkComp

MatterNo: 08-019 Venue: COOK Staff: JSK\Jeffrey S Krause

Stage: Continued Status Dt: 2/15/2008

Client: Sarah Goodrich

Notify Trigger Review Billable Private Status: Open

**Accident**: slipped on dock during rain storm

**Body Part(s)**: left arm, head and neck

**Natur/Extn**: concussion, broken left arm, neck brace required

**%Body Parts**: 25% of arm, 50% of head movement

**Petitioner Details**

Employer: FamousTruckingCo

Job Desc: dock loader

Time Lost: 6 months from Jan-June 06

TTD Period:

O Aww/TTd	\$655.00	\$489.00
D Aww/TTd	\$605.00	\$452.00

**Summary | Inj Detail**

Client slipped on her normal loading dock during a heavy downpour on 2/7/07, breaking her left arm and banging her head on a railing resulting in a concussion that has left her unable to pick up heavy objects and cannot turn her head more than 20 degrees to either side.

Matters - Secondary

The Secondary tab contains details of accident including fields that can be automatically inserted into state WC forms. Petitioner details and AWW/TTD amounts appear here as well.

This tab still leaves you plenty of room to add your own fields and includes a large free form Memo field to input the details of the injuries to your client.

# WORKERS' COMP FORM

## Additional Tab

The Additional tab contains plenty of space to add your own unique fields.

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". The interface includes a menu bar (File, Edit, View, Process, Help) and a toolbar with icons for Save & Close, Save, and Cancel. Below the toolbar is a tabbed interface with the following tabs: Primary, Secondary, Additional (selected), Custom, Related, Notes, Documents, Phone, Email, Mail, Lexis, Billing, Timeline, and AR. The main form area contains the following fields:

- MatterRef: Goodrich, Sarah v. Alexander Hotel
- MatterNo: 08-019
- Venue: COOK
- Code: -WC\WorkComp
- Staff: JSK\Jeffrey S Krause
- Stage: Continued
- Status Dt: 5/31/2008
- Client: Sarah Goodrich
- Notify:
- Trigger:
- Review:
- Billable:
- Private:
- Status: Open

At the bottom of the form is a "Closure Info" section with the following fields:

- Close Date: [dropdown]
- Imaged?: [dropdown]
- Conclusion: [dropdown]
- Who Won?: [dropdown]
- Destroy: [dropdown]
- Loc | Bin: [text input]

A vertical sidebar on the right side of the window is labeled "Matters - Additional".

# 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 Workers' Comp Practice Area Template

# WORKERS' COMP CASE SYNOPSIS

The Workers' Comp 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.

**Goodrich, Sarah v. Alexander Hotel (08-019)**  
**Client:** Sarah Goodrich **Code:** -WC  
**Source:** Attorney Referral Meeks, Carolyn **Staff:** JSK

**Key Contacts**

<b>Ins/TPA:</b> <a href="#">Mountain Insurance Company</a>	Main Ph: 312.555.8989	
<b>Adjuster:</b> <a href="#">Jonathan Smythe</a>	Main Ph: 312.555.2588	<a href="mailto:jsmythe@ipassoc.com">jsmythe@ipassoc.com</a>
<b>Employer:</b> <a href="#">Alexander Hotel</a>	Main Ph: 305-555-5617	
<b>Opp Atty:</b> <a href="#">Walter S. Pierce</a>	Main Ph: 612-555-3367	<a href="mailto:neilj@pd-partners.com">neilj@pd-partners.com</a>
<b>Opp Firm:</b>	Main Ph:	

**Cast Members**

<a href="#">IME</a>	Main Ph: 212-555-6548
---------------------	-----------------------

**Case Info**

<b>DOI</b>	2/07/2007	<b>Case #</b>	07-WC 28765
<b>Last Work</b>	2/08/2007	<b>WC Comm</b>	Susan M. Cottrill
<b>RTW Date</b>		<b>Status Date</b>	6/05/2008
<b>App Date</b>	6/08/2007	<b>Trial Date</b>	7/05/2008
<b>Claim #s</b>	07-31987	<b>Cir Ct #</b>	
<b>SOL Dates</b>	2/07/2009	<b>App   Sup</b>	

© Copyright 2006-2008 IP Associates, LLC All Rights Reserved

# ADDITIONAL POWER VIEWS

Other Power Views that greatly increase productivity for a Workers' Comp practice are:

- Docs – All: Shows all documents linked to the case, with one click access to the actual file. “Documents” can include evidentiary photos, scanned pleadings, 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.



# 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 an IME has been involved on a case and what their opinions were on previous cases? Again, Cast records to the rescue!

# “IME” CAST MEMBER

This IME record is an example of Cast Member. It tracks this expert's unique relationship to this case. When was the exam done, was our attorney and a nurse present? What was the IMEs opinion or diagnosis?

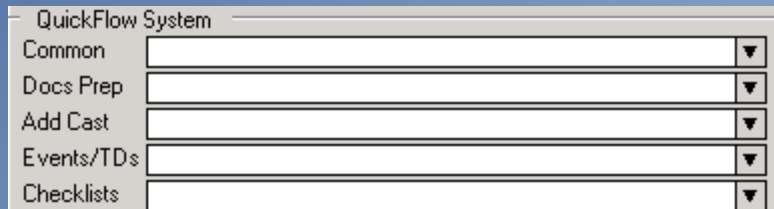
The screenshot shows a software window titled "Cast Form - Change" with a menu bar (File, Edit, View, Process, Help) and a toolbar. The form is divided into several sections:

- Primary / Related / Notes**: A tabbed interface with "Primary" selected.
- Date**: 5/31/2008, Sat, Time: 2:57pm, Code: .IME\Ind Med Exam.
- Description**: IME, Staff: [empty].
- Regarding**: Goodrich, Sarah v. Alexander Hotel, 08-019, Sarah Goodrich.
- Reminders**: Follow, Done, Notify, Trigger, Review, Private, Status.
- Physical Address**: Name: Walter Sufouri (highlighted), Firm: Atland Consulting, Inc, Address: 489 53rd Ave., City: NewYork, NY, 10054, Tel/Fax: 212-555-6548, 212-555-6578.
- Billing Address**: [empty fields].
- Records Address**: [empty fields].
- Treatment/Testimony**: Exam Date: 6/09/2007, Atty Pres: Yes, Nurse Pres: Yes, Report: [empty], Depo: [empty].
- Records Info**: 1st Req, 1st Rec, Upd Req, Upd Rec (all with dropdown arrows).
- Provider Notes**: Opinion is that Sarah can return to work in an office position for next 6 months because she writes right-handed; does not agree with our contention that she has lost mobility in her neck.

# 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 Workers' Comp 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 IMEs, Experts, Attorneys, TPAs, 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/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

IP Associates, LLC

5002 Mesa Court

Waterford, WI 53185

888-732-9071 Tel.

866-258-9062 Fax

<http://www.ipassoc.com>

[info@ipassoc.com](mailto:info@ipassoc.com)