Practice Technology, Inc.

The future of case management…

Prevail

Case Management System

Prevail Case Management System

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1

Getting Started: An Overview

Automating your practice is a process, not an event.

T his simple truth should be the guiding force behind your implementation. As you begin the process, you will quickly realize that there are a lot of decisions to be made, and a lot of work to be done. Make no mistake - your firm's productivity will go down while this work is being done. Fortunately, the gains once you get up and running will far outweigh the initial loss. The overall success of your implementation (i.e. how quickly our software begins saving you time and money) depends almost entirely on your degree of planning and your level of commitment to the process. When considering the "big picture" of implementing Prevail, you need to address the following issues:

<div align="center">

Hardware & Network Preparation
Software Installation / Workstation Configuration
Basic Data Entry
Procedural Decision Making
Forms Customization
Reporting & Management

</div>

We'll try to give you some insight as to how you can plan your implementation to cover all the bases. Remember, the better you plan, the more efficiently it will get done. Your implementation plan must take into consideration each of these elements. We will address them in order of occurrence, but keep in mind that they may need your attention simultaneously.

Hardware and Network Preparation

If you are installing the system on a network, you need to make sure all of your computers can run the software in their present configuration. As with any computer, the more RAM, processing power, and hard drive space, the better. In the computer world, you can never indulge too much in any of these specifications. Each computer must have a minimum of 32MB of RAM in order

for Prevail to run properly, however we recommend 64 MB of RAM. Anything 120mhz or faster should give acceptable performance. If speed is very important to you, you might want to consider something more along the lines of a 300mhz processor. Although Prevail will run with these bare minimum requirements, you must take into consideration your computer habits. If you tend to run more than a few applications at a time, you will probably require more RAM and a faster processor. When using Prevail, it is very common for users to have Prevail, a word processor, and an e-mail application opened at all times. These are very demanding applications. If your system performance suffers while running these three applications, you may want to consider upgrading.

If your computers meet the basic system requirements, you must still take into consideration your network environment. Do you have enough free disk space on your fileserver to hold all of the data and documents once everything gets up and running? You will need, on average, 500KB (or one half of a megabyte) of available disk space for each active client in the system. For example, if you have 200 clients, you will need about 100 megabytes of available disk space to hold the data. Since it takes a while for the data to fill up, you do not necessarily need to have all the disk space available from the start, but make sure you keep an eye on available space. Upgrading a hard disk is not a big deal if you plan for it, but it is a hassle if you have to do it in a crisis situation. Not having enough free disk space will cause data corruption, loss of data, and loss of work time.

You will also want to consider the speed of your network. If you are just running a word processor, you are probably not putting much of a strain on it. Prevail, on the other hand, opens and closes over 100 files at a time. This creates a lot of network traffic, and may cause a slowdown in your network's response time. If you are running more than two users on a peer-to-peer network, you may want to consider using a dedicated fileserver. A fileserver is a computer that does nothing but distribute files to the other computers. That may seem like a waste of a computer, but consider this: If you do not have a dedicated fileserver, one of the computers on your network has to function as both a fileserver and a workstation. If the person using that computer locks up in any application and has to re-boot, everybody is logged out of Prevail, since the date resides on the machine that has locked-up. Speed is also a consideration here. If the computer serving as a fileserver also serves as a workstation, it has to divide its resources between the two jobs. That means it does each job half as well as it would if it were only doing one job.

If your firm will have more than ten people simultaneously using Prevail, then you must also consider purchasing the Advantage Database Server. The Advantage Database Server runs on either Windows NT or Novell NetWare. The database server makes Prevail a true Client/Server environment, where the data is opened on the server, as opposed to each machine that uses Prevail. This greatly improves Prevail's overall speed, index management, and data integrity. If you would like to

purchase the Advantage Database Server, or have any questions regarding the database server, please visit our website at http://www.prevail.net, or give us a call.

Installation and Configuration

Installing Prevail is not very hard, but there are a lot of things that need to be set up on each workstation before the program will run correctly. Before you install the software, read the installation notes, and make sure you understand them. There two parts to the installation: The server installation and the workstation installation. The server installation sets up the databases that will be accessed by the workstations. The workstation installation must then be done on each computer that will run Prevail. The workstation installation puts the actual Prevail program on the local hard drive of each computer on the network. Remember, if you are using Prevail on only one computer, you must run both the server and workstation programs on that computer before you can run Prevail.

You must also decide at this point who is going to be the supervisor or administrator of the Prevail system. This should be a responsible, computer-literate user who is going to be using the software on a regular basis. There are certain features in the software that are reserved for "super" users. Super users are those who are set up in Prevail with the highest security level. You can have more than one super user, but you must have at least one. You can setup Prevail to allow only Super users to access certain features, such as closing or deleting cases, adding/editing/deleting forms and editing the claim process. In small firms it is common to set every user up as a super user as long as they are all reasonably literate. That way you do not have to worry about who does or does not have rights to a particular function.

Basic Data Entry

The most time-consuming element of the implementation process is data entry. Prevail has a lot of timesaving features, but none of them will do anything for you unless there is data in the system. If you already have some kind of database system in place, we can convert your existing data for you (at least some of it) to work with Prevail. If you don't have any kind of database, then you will have to start from the beginning.

Getting all of your clients into the system is a formidable task, but the sooner it gets done, the sooner you begin reaping the rewards. Since Prevail uses pick-lists for "one time" data entry of related parties (medical providers, insurance companies, Judges, etc.), it often helps to put these parties in first. Then, when you are entering clients, you can simply pick related parties from a list rather than

typing them in manually. Do not put off entering your data into the system. It is like cleaning your house — the longer you wait to do it, the longer it takes. One successful approach is to have a Saturday workday where everybody comes in to the office and spends an entire uninterrupted day doing data entry. Make it a casual day and order in lunch. Doing the data entry in an informal environment without the added pressure of the phone ringing makes the process go much faster. Using a team approach with everybody working together should eliminate complaints of individuals "not doing their share."

Procedural Decision Making

The procedural aspect of the implementation is the one which requires the most thought and attention on your part. This is where you decide which of Prevail's features you are going to use, and how you are going to use them. Prevail was developed with input from firms all over the country with differing styles of practice. Because of varying influences on the development of the product, not all firms will use all features. A feature that is considered crucial to a personal injury firm on the east coast might seem utterly superfluous to a social security firm on the west coast. If, after reviewing the guided tour and experimenting with the software, you find a feature you do not think fits your practice, do not use it.

There are, however, certain core elements of Prevail that are used by virtually all firms. Everybody uses the document generation and tracking features, everybody uses the client notes, and everybody uses status tracking. Beyond that, there are no established norms. Some firms choose not to use the calendar because they already have one in place. Some firms do not use the to-do list features because they feel (mistakenly) they are too small to need them. Some firms do not use the time ledgers because they seldom do fee affidavits, and do not mind recreating their time from the file. You have to go through the software and figure out which features are applicable to your style of practice.

One big area of variation in use is the document history feature. Prevail automatically makes a record of every outgoing document you generate. You can quickly glance at the history list and see every document you have sent. This list also has the ability to track incoming documents. Many firms like to enter their incoming documents into history so that a complete chronological record of correspondence, both incoming and outgoing, is generated. Other firms do not want to bother entering every incoming document into history, so they simply make a notation in client notes whenever an "important" document comes in. Neither approach is right or wrong. They are just different.

We do recommend that a decision regarding which features of the software will be used be made with some degree of forethought and discussion. If you step back and let things develop on their own, users will always take the path of least

resistance. This generally means whatever is the least troublesome to them at the time, rather than what is best for your practice in the long run.

If you are a social security firm, you will need to decide the claims process your firm will be using. Once you start using Prevail to some degree, it becomes increasingly difficult to change the claims process without affecting your cases. The claims process is simply an outline used by Prevail to help guide you through an entire social security claim. The process starts with a particular action, such as an appointment with the client, and ends in either a favorable or non-favorable decision. As you update claims, Prevail will suggest the next step by using the process you define. Prevail comes with a standard process that most firms deem proper with minor modifications. For more information on the claims process, and instructions on editing the process, see section on the Claims Utility.

Forms Customization

Prevail comes with a lot of forms and form letters, but you will almost always want to customize these (add letterhead, change signature blocks, add additional language, etc.), or replace them with your own letters. In either case, you will need a person with a sound knowledge of Microsoft Word$^©$ (or WordPerfect$^©$) to accomplish these tasks. Keep in mind that the ability to automatically generate and track documents will, more than any other feature, save you time and money in the long run. Do not gloss over the process of getting them set up the way you want them.

Make sure whoever is setting up the forms has read the chapter in your word processor manual on document merges. While perfectly usable forms can be created by simply inserting field codes into your existing documents, there are also a number of powerful features in both Microsoft Word$^©$ and WordPerfect$^©$ script languages that you may want to take advantage of. If you can't find your word processor manual, or you want additional help, the "How Do I..." section of this manual contains basic instructions for creating a form or form letter. It is no substitute for knowing your way around the more advanced functions of your word processing software, but it is enough to point you in the right direction.

Reporting and Management

The management portion of case management software is often forgotten once a firm gets a system up and running. Once all your data is in Prevail and you have been using it effectively for a while, you need to consider what type of information you may want to get out of the system. There are already a number of status-based reports in the Prevail Reporter, but you may want to create others. For information on the Prevail Reporter, please read the Prevail Reporter manual.

The Prevail Reporter manual will guide you through basic report creation, reporting concepts, and tips on creating powerful functional reports.

Chapter

2

Installing the Software

Installing the components necessary to start using the Prevail system.

Before running Prevail, install both the server portion of Prevail, and the client application. If you plan on installing Prevail on only one computer, the server portion, as well as the client application, should be installed on the same machine. If you plan on using Prevail across the entire network, the server install must be performed on the computer that is the fileserver, unless the server is running Novell NetWare®. In that case, install the server portion via a workstation with the server drive mapped accordingly.

Installing the Server

To install the server portion of Prevail, place the Prevail CD in the CD-ROM drive. If auto run is enabled, the Prevail Installer will automatically appear. If it does not, run X:\Install.exe where X is the letter of your CD-ROM drive. Before installing anything, click the 'Read Me!' button to read the latest information about the installations not available at the time of this printing.

If your fileserver is running Novell NetWare®, you must map the server drive to a workstation before you can run the install. To map the server drive, run the Windows Explorer by choosing Start→Programs→Windows Explorer (or Windows NT Explorer). Choose Tools→Map Network Drive from the menu. Choose a letter for the drive. We recommend using P: if available. Next, using the 'Shared Directories' tree view, select the server computer and the drive that you plan on installing the Prevail server files to. The UNC (Universal Naming Convention) path will automatically fill in when you select a drive. Make sure the 'Reconnect at Logon' checkbox is checked, and then click the 'OK' button. A new hard drive icon will appear on the left side of the Windows Explorer with the letter you chose.

On the Prevail Installer, click the 'Install Server' button to run the server setup program. Once loaded, the setup will guide you through the rest of the installation. When asked for a location, choose C:\Prevail if you are running the installation on the server machine, or if installing on a Novell NetWare® system, choose X:\Prevail where X is the mapped server drive.

Installing the Client

Before installing the Prevail client application, the server drive that holds the Prevail data has to be mapped to the workstations that will use Prevail. To map the server drive on a workstation, go to the workstation and run the Windows Explorer by choosing Start→Programs→Windows Explorer (or Windows NT Explorer). Choose Tools→Map Network Drive from the menu. Choose a letter for the drive. We recommend using P: if available. Next, using the 'Shared Directories' tree view, select the server computer and the drive that you plan on installing the Prevail server files to. The UNC (Universal Naming Convention) path will automatically fill in when you select a drive. Make sure the 'Reconnect at Logon' checkbox is checked, and then click the 'OK' button. A new hard drive icon will appear on the left side of the Windows Explorer with the letter you chose.

To install the Prevail client, place the Prevail CD in the CD-ROM drive of a workstation that will be running Prevail. If auto run is enabled, the Prevail Installer will automatically appear. If you have not already read the 'Read Me', click the 'Read Me!' button for the latest information regarding the installations. Click the 'Install Client' button to run the client setup. Once the setup has loaded, follow the onscreen directions. When asked for a location, choose C:\Prevail. Make sure no virus scanners are running before attempting to install the software. Once the setup program has completed, a Prevail icon will appear on the desktop.

Installing the Control Panels

The Control Panel should only be installed on the Prevail administrator's computer, or the person that will be responsible for maintaining Prevail. The Control Panel is a set of utilities used to maintain the Prevail databases, update the Prevail components, add new users to the Prevail system, send system-wide messages, clean up old calendar data, replace user responsibilities and make quick backups.

To install the Prevail Control Panel, place the Prevail CD in the CD-ROM drive of the workstation of the Prevail administrator. If auto run is enabled, the Prevail Installer will automatically appear. If you have not already read the 'Read Me', click the 'Read Me!' button for the latest information regarding the installations.

Click the 'Install Administration' button to run the Control Panel setup. Once the setup has loaded, follow the onscreen directions. When asked for a location, choose C:\Prevail\Control. Make sure no virus scanners are running before attempting to install the software. Once the setup program has completed, a Prevail Control Panel icon will appear on the desktop.

Upgrading the Server

If you are already running a previous version of Prevail, you must upgrade both the server and client portions of Prevail. Before attempting to upgrade the server, make sure you have a recent backup and all users are logged out of Prevail. If you do not have a recent backup, run a backup before upgrading Prevail. Depending on the amount of data currently in Prevail, the upgrade can take anywhere from five minutes to two hours. It is a good idea to run the upgrade after office hours to ensure minimum downtime.

Depending on your current version of Prevail, you may need to run more than one server upgrade. If you have not already read the 'Read Me', click the 'Read Me!' button for the latest information regarding the installations. If an error occurs during any of the upgrade procedures below, note the error and call Practice Technology at 407.228.4400. Also, check the Prevail web site at http://www.prevail.net for more information about the error that occurred. Please make a note of your current version of Prevail, and find the appropriate upgrade path below.

3.7.x or Lower
When you are ready to run the server upgrade, click the 'Upgrade Server' button on the Prevail Installer and choose "From 3.7.x or lower to 3.9.1". Take the time to thoroughly read the text in the conversion window. Be sure to follow all on-screen instructions. Once the conversion has completed, the conversion program will display the text, "The Conversion has completed." At that time, close the conversion program by clicking the X in the upper right-hand corner. You have successfully upgraded the server to 3.9.1. Unfortunately, we have to run one more conversion to get your data to 3.9.2.

On the Prevail Installer, click the 'Upgrade Server' button again and choose "From 3.9.1 to 3.9.2". The 3.9.2 Server Upgrade window will appear. Click the 'Upgrade Now!' button to begin the upgrade. Once complete, close the 3.9.2 Server Upgrade window. You are now finished upgrading your Prevail data to 3.9.2.

3.9.0
When you are ready to run the server upgrade, click the 'Upgrade Server' button on the Prevail Installer and choose "From 3.9.0 to 3.9.1". The 3.9.1 Server

Upgrade window will appear. Click the 'Upgrade Now!' button to begin the upgrade. Once complete, close the 3.9.1 Server Upgrade window.

On the Prevail Installer, click the 'Upgrade Server' button again and choose "From 3.9.1 to 3.9.2". The 3.9.2 Server Upgrade window will appear. Click the 'Upgrade Now!' button to begin the upgrade. Once complete, close the 3.9.2 Server Upgrade window. You are now finished upgrading your Prevail data to 3.9.2.

3.9.1

When you are ready to run the server upgrade, click the 'Upgrade Server' button on the Prevail Installer and choose "From 3.9.1 to 3.9.2". The 3.9.2 Server Upgrade window will appear. Click the 'Upgrade Now!' button to begin the upgrade. Once complete, close the 3.9.2 Server Upgrade window. You are now finished upgrading your Prevail data to 3.9.2.

Upgrading the Client

After upgrading the server, each workstation must be upgraded. If you attempt to run an older version of Prevail, you will get many errors when it tries to access the database. On each workstation, place the Prevail CD in the CD-ROM drive. If the Prevail Installer does not automatically appear, run X:\Install.exe, where X is the letter of the CD-ROM drive. Click the 'Upgrade Client' button to run the client setup. Follow all on-screen directions. When prompted for a location, choose C:\Prevail. When the installation completes, a new Prevail icon will appear on the desktop.

Chapter

3

Guided Tour

"The Magical Mystery Tour is waiting to take you away…" – The Beatles

Once the server and client portions of Prevail have been installed, there are a few things that need attention before running Prevail. If a word processor has not been installed on the workstation being used at the moment, it is a good idea to go ahead and install it. A word processor is not necessary to run Prevail, but this chapter will address document issues by using examples. Read the word processor's installation instructions. Be sure to install any option that contains 'OLE' in the description. Prevail uses OLE (Object Linking and Embedding) to take control of either Corel WordPerfect® or Microsoft Word®. If the OLE options are not installed, Prevail will not merge documents.

Adding a User

Before running Prevail, we must first add your user name to the Prevail system. Run the Prevail Control Panel by double-clicking the Control Panel icon on your

desktop (). Click the 'Users' button on the Prevail Control Panel. You will be prompted to enter a login name. Enter 'DEMO', with all caps, and click the 'OK' button. Next, you will be prompted for a password. Leave the text blank, and click the 'OK' button. Click the 'New' button on the toolbar, and fill in the information for yourself. Be sure to

fill-in the 'Login' field. This will become your nickname in the Prevail system. Whenever you create a document, time entry, cost entry, to-do, or appointment, your login will be attached to these items. It is used to let other users in Prevail
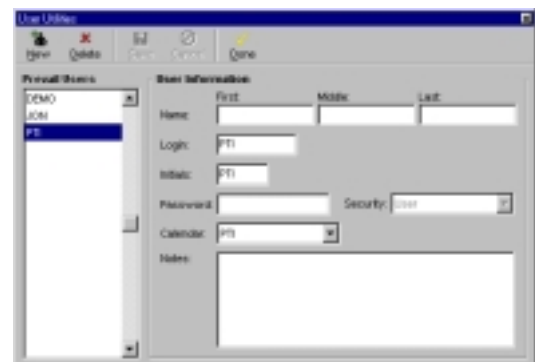
know who did what. The login can only be eight characters. We recommend using first names, last names, or initials for logins. If you have more than one user with the same first name, last name, and initials, let them make up a name to differentiate from another user.

If you want to tighten security in your office, use a password to protect unwarranted people from logging into the system. Since you are the first user in Prevail and reading this manual, we will assume you are going to be the Prevail administrator. Set your 'Security' by choosing 'Super User' from the drop-down box. This will allow you to add and edit users in the system.

Click the 'Save' button to add your login to the system. Click the 'Cancel' button to discard changes. Click the 'Done' button to close the User Utilities, and exit the Control Panel. If you would like to learn more about the Control Panel, read the chapter titled 'The Prevail Control Panel'.

Running Prevail for the First Time

Run Prevail by double-clicking on the Prevail icon () on the desktop, or choose Start→Programs→Prevail→Prevail. The first time you run Prevail, a window called 'Prevail Settings' will appear. This window will only appear the first time you run Prevail on each workstation. Let's configure Prevail so we can continue with this tour.

Configuring Prevail

In the 'Login ID' field, enter the login we just added to the system.

The 'Database Server' option specifies how Prevail will retrieve the data. If you have purchased and installed the Advantage Database Server, then choose Remote to take advantage of the Client/Server environment. If you do not have the database server and are participating on a LAN (Local Area Network), select Local. If you have purchased, installed, and configured the Advantage Internet Server, then choose Internet.

If this machine is part of a network and the TCP/IP network protocol is installed, then enable the 'Machine is on a Network' option. Enabling this option will make this machine available to receive system wide messages and enable Prevail's Chat feature. If you do not have TCP/IP installed on all of your

machines, do not enable the 'Machine is on a Network' option. Doing so may result in error messages when you attempt to run Prevail.

The Network Path specifies where Prevail will look for the data. If you are participating on a Network, be sure you have mapped the server drive. If you have not, please see the chapter titled 'Installing the Software'. If you have mapped the drive, click the Browse button next to the Network Path field and select the drive and directory where the Prevail data exists (usually P:\Prevail).

The Local Path specifies where Prevail is installed. This should usually always be set to C:\Prevail unless you are running an abnormal Prevail installation (Terminal Server, Metaframe, etc.).

The Merge Path is the directory that will store temporary files when merging a document. This value is normally C:\Prevail unless you are running an abnormal Prevail installation (Terminal Server, Metaframe, etc.).

Select your Word Processor brand and version by using the drop down boxes. Click the Browse button to find your Word Processor's path.

Prevail has the ability to launch your preferred mail client when you choose Mail in Prevail. Use the Browse button to select your favorite mail client application.

When you have completed configuring Prevail, click the 'Save' button to save the settings and load Prevail.

Logging In

Prevail 3.9.2 allows you to use Prevail from any machine in the office using your own login name. Select your login name from the 'Login' drop-down box and enter your password. If you did not enter a password when adding your login to the system, leave the 'Password' field blank and click the 'Login' button. If you need to exit Prevail without logging into the system, click the 'Exit' button.

Once you click the 'Login' button, Prevail will load all necessary data files, and take you directly to the first client data screen of the program. Note that there is no main menu per se. The first view you see is the first client record in the system, or the last client record you were working with the last time you exited Prevail. Most users, if not all, appreciate the quick access to client files without having to navigate through mundane menus or welcome screens. Prevail comes pre-loaded with several sample, or test, clients in the system. You can use these to learn your way around the system, then close them after entering a few of your own.

The Interface

The main Prevail interface consists of seven parts. The Title Bar is found across the top of the Prevail window. Information such as the client's name, social security and case number can be found there. If you are viewing closed cases, the date the case was closed can also be found on the Title Bar. The Main Menu is a series of drop-down windows that contain items to every feature found in Prevail. The Toolbar is a bar of buttons used to gain quick access to commonly used features. The Page Name, located on the right side below the Toolbar, displays the name of the current page showing in Prevail. The Navigation Bar, located to the right of the Page Name, is used to navigate through Prevail. The Page Content changes according to tab and provides the majority of user input. Finally, the Tabs located across the bottom of the Prevail window is used to page through different areas or groups of information in a case.
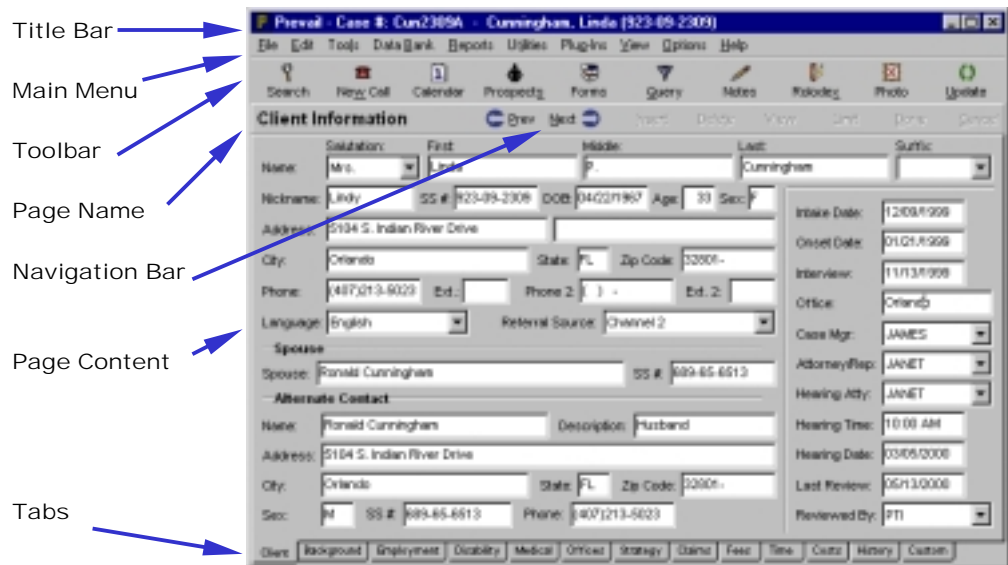
Customizing for Your Firm

Every firm that uses the Prevail Case Management System uses it in a different manner. Some firms use Prevail to its fullest ability, and others use portions of the program that fills a void in their current management practice. Either way, each firm needs the ability to customize Prevail to fit their needs. Part of customizing Prevail is setting up all of the data users will not change on a daily basis, such as the firm information, attorneys, and case managers. Let's start with the firm information.

Firm Information

Choose Data Bank→General→Firm Information from the main menu. Prevail's Firm Information input window allows you to input your firm's address and phone numbers for automatic merging into forms and letters. Replace the sample data on the screen with your firm's data. Press the 'Tab' key to move from field to field, or click the mouse cursor on each field to enter data.

Unique Feature:

Notice the 'Interest Rate' field at the bottom of the firm information window. Since some states allow you to charge interest on costs advanced for your cases, Prevail has the ability to calculate interest on the cost ledger of each case. When you enter an interest rate in this field, Prevail will calculate the interest charged on each cost item in each case, starting from the date each individual cost entry was incurred. If you do not want to calculate interest on your costs, leave this field set at zero.

When entering your firm's information, notice that the cursor jumps from the second address field to the zip code field. Prevail has a built-in zip code list with every city and state in the U.S. Enter the zip code and the city and state will automatically appear. If the city is incorrect, simply start typing the correct city. If the new city is stored in Prevail's zip code list, a hint window will appear with a city that matches your keystrokes. If this is the correct city, hit the Enter key on the keyboard to select the city. If the city is not stored in the zip code list, just continue to type the entire city name.

After you have entered the firm information, click on the 'Done' button to save changes. From now on, when you merge any document that contains the field codes for the firm information, your firm's name, address, phone numbers, etc. will be inserted to the document.

Firm Attorneys

Now that you have entered your firm's information, it is time to enter the firm's attorneys. Prevail comes with a few test attorneys already in the system, but these are for demonstration and testing purposes only. This step is not necessary at the moment, but eventually all firm attorneys will need to be added to the system. Note that adding a user that is an attorney and adding a firm attorney are two different things. An attorney must be a Prevail user to be able to login and use the Prevail program. However, not all attorneys use the Prevail program. If an attorney is going to use Prevail, then that attorney needs to be added as both a user and a firm attorney.

To add a firm attorney, choose Data Bank→General→Firm Attorneys from the main menu. A window will appear that will eventually become very familiar. As you can see, a few test attorneys are already in the system. If you wish, delete them at this time by selecting the attorney and clicking the 'Delete' button. To add a new attorney, click the 'New' button. Fill in the information.

> **IMPORTANT!**
>
> Make sure you fill in the 'Login ID' field. Prevail uses the login ID in drop-down lists to assign attorneys to cases. **If the attorney uses Prevail, make sure the Login ID is the same as his/her user Login ID, or else to-dos, appointments, etc. will not show up for the attorney when using Prevail.**

Click the 'Done' button to save the attorney, or click the 'Cancel' button to discard changes.

Case Managers

A Prevail case manager is any person within your firm who has day-to-day responsibility for handling files. Usually the case manager is a paralegal or legal assistant, but some firms enter their attorneys as case managers as well. Prevail defaults many automatic reminders (e.g. document follow-up, statute of limitations, etc.) to appear on the case manager's to-do list. It is very important to assign a case manager to a case.

To add a case manager, choose Data Bank→General→Case Managers from the main menu. A few test case managers are already in the system. If you wish, delete them at this time by selecting the case manager and clicking the 'Delete' button. To add a case manager, click the 'New' button. Fill in the information.

> **IMPORTANT!**
>
> Make sure you fill in the 'Login ID' field. Prevail uses the login ID in drop-down lists to assign case managers to cases. **If the case manager uses Prevail, make sure the Login ID is the same as his/her user Login ID, or else to-dos, appointments, etc. will not show up for the case manager when using Prevail.**

Click the 'Done' button to save the case manager, or click the 'Cancel' button to discard changes.

Now that you have seen how to enter attorneys and case managers, essentially every item in the Data Bank menu is added in the same manner. Take a moment to look through the Data Bank menu to see exactly how much of Prevail can be customized by adding people, places, codes, descriptions, etc.

Custom Fields

Since all of the fields in the Prevail database are predefined, it leaves little customization as far as what data is being stored. However, Prevail has a set of eighteen custom fields that can be used in anyway see fit to help Prevail fit into your firm. One thing you must remember is that the custom fields apply to all cases of type social security or personal injury. This will make a lot more sense when you see it in action.

Choose Data Bank→Personal Injury→Custom Field Labels from the main menu. The 'Custom Data Field Labels' window will appear. Set 'Field 1' to 'Holiday Card', and click the 'Done' button to save it. Next, choose Data Bank→Social Security→Custom Field Labels from the main menu. Set 'Field 1' to 'Holiday Party', and click the 'Done' button to save it. Next, on the Prevail window, click on the 'Custom' tab to view the custom fields. If you are on a social security case, the first custom field will say 'Holiday Party'. If you are on a personal injury case, the first custom field will say 'Holiday Card'. Now, click the 'Previous' and 'Next' buttons to move to the next and previous cases. As the case types change, so do the custom fields. So, in essence, you really have thirty-six different custom fields to work with, but only eighteen per case. For more information on custom fields, see the chapter titled, 'Custom Fields'.

Claims Utility

If your firm practices social security, the Claims Utility is perhaps the most important customizable feature in Prevail. The Claims Utility is used to create, modify, and remove steps from the Social Security claim process. Prevail ships with a default set of steps, but few firms find the need to tailor this process specifically for their firm. If you are a new user to Prevail, it is recommended that you first plan how your firm will handle claims and then edit the claims process to reflect your needs before you start to add clients into Prevail. Once you begin to enter clients into Prevail, it becomes increasingly difficult to process all clients in the same manner. We will not go into the Claims Utility at this time, but this is something you should be thinking about while you are becoming familiar with Prevail. For more information on how to use the claims utility and much more, see the chapter titled, 'Social Security'.

Social Security Tour

Client Information

The Client Information page contains basic contact information about the currently selected client. In addition to the standard biographical data, this page contains referral source information, alternate contact information and information on who is responsible for the case.

If you want to add or change information on this page, click on the 'Update' button in the toolbar. This will let you access and change the information in any of the fields on the page. When Prevail is in update mode, the fields will turn yellow. If Prevail is in insert mode, the fields will turn green. You will notice that some of the fields (e.g. salutation, language, etc.)

have pull-down arrows to the right of them. These are called drop-down boxes, and instead of typing in these fields, click on the down arrow and select an entry from the list that pops up. You may notice that when you click on a pull-down arrow, the 'Insert' button enables. If you wish to add items to the drop-down box, you can do it by clicking on the 'Insert' button. An entry window will appear, allowing you to add your entry. Click the 'Done' button, or press the F12 key to save your changes. If you do not want to save your changes, click the 'Cancel' button, or press the Esc key.

Background Information

The Background Information page contains additional information about the selected client's education and military background. It also contains information about the client's income and assets.

If you want to add, change, or delete any of the information displayed on this page, click the 'Update'

button on the toolbar. You can then click the mouse cursor on any of the fields you want to change, adding or deleting information as desired. When you are finished, click the 'Done' button in the upper right-hand corner of the screen and your changes will be recorded.

Disability Information

The Disability Information page lets you list specific impairments for the currently selected client. In addition to listing detailed information on each individual problem, this page also has room for a detailed narrative about all of the client's health problems.

You can list as many individual ailments as necessary. To add an ailment, click the 'Insert' button. You can also delete ailments by selecting the ailment and clicking the 'Delete' button. When you select an ailment, the detail will be displayed next to the 'Claimed Disabilities' list, displaying information such as how long the client has had the problem, any workload limitations caused by the problem and any treatment the client receives for the problem. There is also a numeric field (i.e. 0-9) for you to list your own subjective evaluation of the severity of each problem.

The 'Claimant's Description of Disabilities' field allows you to list in the client's own words a summary of his or her disabilities. When generating forms you can then merge this information as a claimed disabilities addendum to your SSA forms rather than trying to fit a detailed description of your client's ailments in the space provided on the individual forms.

Offices Information

By clicking the 'Offices' tab, you can access name, address and phone numbers of your contacts with the Social Security Administration for the currently selected client.

This page contains information on the district office, Disability Analyst (DDS), and OHA/ALJ. It also contains contact information for a long-term disability insurance provider. Prevail 3.9.2 includes a list of all SSA offices, Disability Analysts (DDS), and OHA (ALJ) offices in the United States. When activating a prospect, these offices are automatically selected based on the client's zip code. If you need to update an existing client's SSA offices, choose Utilities->Update

Offices from the main menu and Prevail will reassign the offices. If the assigned office is wrong, you can simply pick the desired office from a list. By clicking on the magnifying glass icon to the right of any of the displayed parties, you can "zoom in" to see address and phone number information.

To add or update information on the page, click the 'Update' button. You will notice that some of the fields on this page have 'Choose' buttons to the right of them. To select an entry for any of the items (SSA Office, DDS, OHA/ALJ, etc.), click the 'Choose' button next to the item you would like to change. A list of entries will be displayed. Pick a name from the list, and click the 'Done' button. By clicking the 'Done' button, you have selected that item. At the Prevail window, click the 'Done' button to save the changes.

Strategy Information

The 'Strategy Information' page lets you enter notes about how you plan to pursue this claim. You can enter physical description of your client, listing and grid information, as well as indicating whether the client is capable of working or currently working. You can also assign a medical and vocational expert from the Related Parties/Experts database. To update the information on this page, click the 'Update' button. Fill in any or all of the fields as desired, and then click the 'Done' button when you are finished.

Claims Information

You can access a complete history of all claims filed with the SSA on behalf of the currently selected client by clicking the 'Claims' tab. This page contains a complete chronology of up to three separate claims.

Although you normally only have one claim filed, Prevail gives you the ability to track up to three claims in case you have one denied or wish to start the process over while the original claim is still pending (e.g. in Federal District Court).

You can select which claim you want to view by clicking the desired number in the 'Claim Number' choice box on the upper right side of the page. By default, this page will display the history of 'Claim 1' since most claimants only have one claim filed at a time. If a client has more than one claim currently being tracked, a black dot will appear to the left of the claim number. If there are three claims currently being tracked, there will be a dot beside 'Claim 3' as well. These dots will show up regardless of which claim is currently selected – they are only there to let you know that more than one claim exists for this client.

For each claim, Prevail displays the claim type, current level, next required action, hearing date and hearing time if applicable. A chronology is also displayed which includes every official change in claim status to-date. This chronology is integrally linked to the document generation section of the program so the claim will automatically be updated when certain documents are generated. For example, if a claim is denied at the initial level and you generate a Request for Reconsideration, the system will know that the status of this claim has changed. You do not have to update the status of the claim because Prevail will do it for you.

You can also manually update a claim status by clicking the 'Update' button. The program will prompt you to enter the pertinent information and then update the chronology to reflect your response. Any required statute reminders will be made automatically on your to-do list.

Fees Information

The Fees page of Prevail allows you to track what happens in a case after the favorable decision has been reached. There are fields for you to enter claimed and approved onset dates, application date, and favorable decision date. There are also fields for primary insurance amount, offset amount, and adjusted primary insurance amount.

In addition to the date and amount fields, there is a history section that allows you to insert entries into the fees tracking ledger. To insert an entry into this ledger, simply click the 'Insert' button. A window will appear allowing you to enter specific information on this fee tracking entry. The top line is the 'Description' field for this entry. Click on the pull down arrow to the right of this field to select one of the pre-determined entry categories (to add a category to the drop-down list, press the Insert key). After you have selected a category, move to the 'Entry Date' field and enter the date for which this item is applicable (usually this will be date of award, date of approval, etc. – whatever date is pertinent to this entry). The next field is a 'Paid Date' field, which will determine when the fee has been paid. It is a good idea to use this field for reporting purposes to know which fees have been paid and which have not. The next field is an amount field to specify a dollar amount for this fee item. There is also a memo field to enter detailed information or notes about this fee entry.

Keep in mind that you can have as many fee entries as you want in the 'History' section, so you can break the fee history for this claim down into individual components if you like (e.g. benefits approved, fee approved, DIB fee received, SSI fee received, etc.).

Personal Injury Tour

Plaintiff Information

The 'Plaintiff Information' page contains basic contact information about your plaintiff, as well as important dates relative to the case and demand/offer information. On the right-hand side of the page you will see pull-down lists which show the attorney and case manager (paralegal) handling the case, as well as when the file was last reviewed, and who reviewed it.

If you want to add or change information on this page, click the 'Update' button. This will let you change the information in any of the fields on the page. Notice that some of the fields have pull-down arrows to the right of them. Instead of typing in these fields, you simply click on the down arrow and select an entry from the list that pops up. When you are finished adding/changing information on this page, click the 'Done' button and your changes will be recorded.

Defendant Information

The 'Defendant Information' page lets you enter as many defendants as you like for the currently selected case, and also lets you select an insurance carrier, adjuster and opposing counsel for each of the defendants. By highlighting a defendant from the list, you can see the corresponding adjuster & opposing counsel information for that defendant. Notice the zoom buttons on the right side of the page. By clicking on these, you can see detail on the defendant, insurance carrier, or the opposing counsel for the currently selected defendant.

You can add or delete defendants by clicking the 'Insert' or 'Delete' buttons on the navigation bar. If you want to update information for the currently selected

defendant, click the 'Update' button, and make your desired changes. Remember to click the 'Done' button when you are through editing the information. Notice that the insurance carriers and opposing counsel entries can be picked from a list rather than having to be typed in directly. This way, once you make an entry into the database, it is there and available to be selected for any case. You can also insert new entries to these databases "on the fly" if you need a name that is not already on the list.

Accident Information

The 'Accident Information' page allows you to enter information about the accident and injuries for the currently selected case. Note there are four dates of accident to allow for worker's compensation cases where multiple dates are common. Since Prevail handles multiple law types (personal injury, medical malpractice, worker's comp, social security), not all of these fields will necessarily be filled in for any given case.

Note that for auto cases there are fields for vehicle information, as well as a pull-down list to select the investigating police agency that responded to this accident. This allows you to automatically request accident reports without having to manually type this information in your letter.

To add or change any information on this page, click on the 'Update' button in the upper right hand corner of your screen. Remember to click the 'Done' button when you are through editing, and your changes will be recorded.

Court Information

The 'Court Information' page allows you to enter information regarding the judges and court that will be handling this case. In addition, there are fields that allow you to enter case style and caption information exactly as you want it to appear on your pleadings.

You can enter an unlimited amount of hearings per case. Each hearing can have its own Judge and attorney. To add a hearing, click the 'Insert' button. The 'Hearing Information' window will appear, where you can choose the hearing's

date and time, the attorney, the judge or mediator, and a description for the hearing. Click the 'Done' button to save the hearing. Prevail will automatically create an appointment for the hearing in the calendar. Once the hearing has been entered, you can change the court information if necessary by selecting the hearing and clicking the 'Update' button. To change the hearing's date, time, attorney, or description, double-click the hearing. Any changes to the hearing entry will be made to the hearing's appointment in the calendar and vice-versa.

Strategy Information

The strategy screen consists of two free-form memos that allow you to enter as much information as you like. The 'Case Strategy' field is generally used to enter a

synopsis of how you intend to pursue this case (useful if someone else has to cover something for you and needs to know what the case is all about). Some attorneys like to do strategic brainstorming and record their ideas in this field.

The 'Liens' field is simply a place where you can make a notation of any pending liens and letters of protection that are outstanding on this case. It is also a good idea to indicate if you are obliged to pay a referral fee to another attorney on this case.

To add or modify information in either of these windows, click on the 'Update' button in the upper right-hand corner of your screen. After making any desired changes, click the 'Done' button.

Parties Information

It is common to have dealings with parties who are associated with a case, but do not fit into any of the categories already provided in Prevail. If a person or entity does not fit into any other pre-defined categories on the other pages, you can put them on the 'Parties' page. Since the categories on this page are user-definable, you can add any type of party, as well as a description of how they relate to this case. Commonly used categories for this page include witnesses, court reporters, additional insurance providers, co-counsel attorneys, private investigators, and mediators. You are not limited to these, however. You can add more as you start to use Prevail.
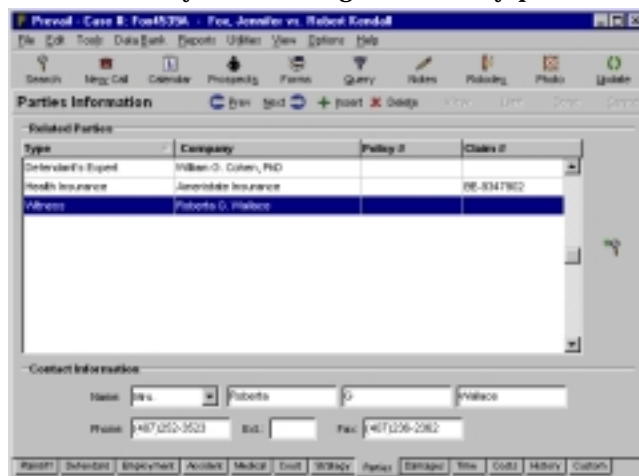
To add a related party to the currently selected case, click the 'Insert' button. Select a category for the 'Type' field. If the type you need is not in the list, choose Data Bank→Personal Injury→Related Party Types and add the type you need. To select a party, click the 'Choose' button to the right of the 'Company' field. This will allow you to search the database for entries that have already been made. If the party you want to enter is not in the database, click on the 'Add' button. You can then select the name and click the 'Done' button to select the party for this case. There are some additional fields for policy and claim information if the party happens to be an insurance carrier, but you can ignore them if it is not.

Notice that there are additional fields for contact information below the 'Related Parties' grid. These fields allow you to enter the name and phone number for your contact person within the company or organization that is currently selected. As you highlight different entries in the 'Related Parties' grid, corresponding contact information for the selected party will be displayed in the window below. To add or change any of this contact information for a party, select the party, and click the 'Update' button. You can now modify the contact information fields as desired. Remember to click 'Done' button when you are finished to save the changes.

Damages Information

The 'Damages Information' tab is where you can enter an unlimited number of damage claims and lien information. To add a new damage or lien, click the 'Insert' button and choose 'Damage' or 'Lien' from the drop-down menu.

If you choose to add a damage, the 'Liabilities View' window will appear. There, you can select a medical provider by clicking the 'Choose' button, enter the damage type, dates of service, the amount of damage, description, and any details related to the damage.

If you choose 'Lien', the 'Health Insurance/Lien Holder' window will appear. You can then select an insurance provider by clicking the 'Choose' button, and enter the policy number, notice that the lien was received, amount insured, and amount paid.

Common Tabs

There are a few tabs that are visible for all case types. They have the exact same function for each law type. Instead of explaining them for both the social security and personal injury tour, these tabs will be explained below.

Employment Information

The Employment Information screen contains information about the client's past employment history. You can add as many past employers as you like by clicking on the 'Insert' button. You can add specific information for each employer including name, address, phone number, dates of employment and workload. There is also space for a

narrative description of actual job duties.

Once employment information is entered for one or more employers, you can display information on each employer by selecting an employer from the 'Employers' list located on the left side of the page. To edit an employer's information, select the employer, and then click the 'Update' button.

Medical Information

By clicking on the 'Medical' tab, you can get a summary of medical treatments for the currently selected client. This includes a list of medical providers that have

treated the client, as well as a treatment detail for each provider. You can view the treatment history for any provider by selecting the provider's name in the 'Medical Provider' list. The treatment history displayed in the lower portion of the page includes dates of treatment, when medical records were last requested and when they were last received. There is also a field that indicates if the firm paid a charge for the records. If there was, the charge was automatically posted to the case costs sections, which will be discussed later.

By glancing at the treatment history for a provider, you can instantly tell what your client was treated for, what records you have and what records you do not have. You can also add additional treatment history entries for each provider. For

example, if a chiropractor had previously treated your client for back pain, you would already have an entry listed in treatment history. If your client later went back to the same chiropractor for neck pain, you could click the 'Insert' button to add another treatment history item for that provider. The provider's name and address information would already be listed, so you would just have to add specific treatment information (e.g. purpose, dates, etc.). Once you enter a

provider into the database, you never have to re-type the information if you

encounter the same provider again in another case — you can simply pick the name from a list.

To add a provider to the currently selected case, click the 'Insert' button. Next, click the 'New Provider' button. You can then select from a list of providers. If you need to add a new provider to the list, click the 'Add' button. The information you enter about the provider will be saved for later use. You will then be prompted to enter a treatment summary for the new provider with the current client (i.e. what they were treated for, dates, etc.).

When you select one of the treatments listed in the 'Treatment History' list, the detail appears to the right of the list, giving more information about that specific treatment. This information includes treatment date range, when records were last requested, when they were last received, whether your firm paid for the records, and whether the SSA already has a copy of these records.

Time Information

In order to help you track time in your cases, Prevail maintains a time ledger for each case. You can access the time ledger for the currently selected case by clicking the 'Time' tab.

When you click this tab, a time summary will show all time entries for the currently selected case. This display will include the date, description, user, and time amount for each entry. At the bottom of the summary screen, a 'Total Time' field will display the sum of hours spent on this case to-date.

To make a new time entry, simply click the 'Insert' button. Notice that the fields in the 'Item Description' section are now green. This is used to indicate that the system is in "insert mode". Start typing the description of the time entry and you will notice that Prevail will try to figure out what you are typing. This "hunting" ability allows for quick time entries. If Prevail finds a match, it will enter the amount as well. If you hit the enter key on your keyboard, the cursor will jump to the end of the description so you can easily add additional information. You can modify the list of predefined time types by choosing Data Bank→General→Time Types. Enter the date, user and a detail if necessary. When you print your time reports later, you can print them with or without the 'Detail'.

When you are finished making your entry, click the 'Done' button. The total hours in the case will be updated to reflect your new time entry.

Costs Information

Prevail contains an integrated cost ledger to help you track costs advanced in each of your cases. You can access the cost ledger for the currently selected case by clicking the 'Costs' tab.

Each cost entry in the summary includes a date, description, check number, 'To'

(payee), and amount. The ledger also has a column called 'Interest'. Since some states allow you to charge interest on costs advanced for your cases, Prevail has the ability to calculate interest on the cost ledger. You can enter an interest rate by choosing Data Bank→General→Firm Information.

The Prevail cost ledger has the ability to track both costs (i.e. you advance money) and payments (i.e. the client reimburses you). You can make either a cost entry or payment in the ledger by clicking the 'Insert' button. When you click 'Insert' the fields in the 'Item Description' will change to green. This is to let you know you are in "insert mode". Enter the information and click the 'Done'. The total at the bottom of the cost ledger will automatically be updated to reflect your new entry.

History Information

In addition to creating form letters and SSA forms, Prevail also keeps track of them. When you generate a letter or an SSA form, it is automatically saved and a record of that document is made in the document history for the currently selected case.

This history includes a description of every document sent (or received)

for this case. Each line in this summary represents an individual document. The entry for each document includes the date of the document, who generated it, a narrative description of the document, when a response to the document is expected, and whether there is detail (additional notes) on the document.

If there are notes on a document and you want to view them, you can simply double-click on the document's listing in the summary. This will bring up a more detailed view of the document that includes the case manager (the person who will receive the follow-up reminder for this document on his/her to-do list), notes, time charged for the document (Prevail can automatically bill the file every time a specific document is created), and even the physical file name of the document. When you are finished viewing the entry, click on the 'Done' button at the bottom of this window.

Since Prevail automatically saves all of your documents, it also knows where to find them if you want to retrieve them later. To retrieve any document listed in the history summary, select the document and then click the 'View' button on the navigation bar. Prevail will automatically open the word processor and retrieve the document. When you are done viewing the document, you can either minimize or close your word processor, and switch back to Prevail. If you want, you can leave both Prevail and your word processor running at all times.

If you want to quickly search through your document history entries to find a specific document or group of documents, you can use the 'Limit' feature by clicking the 'Limit' button. This will show the 'Text Search' window. Enter a keyword or text string (i.e. the word you want to search for), and specify which field you want to search in for that word.

After you have entered a search string and clicked on the 'OK' button, Prevail will limit the display of documents so that only those documents that match your search criteria are displayed. Notice that the grid turns purple and the 'Limit' button now says 'RESET'. This is too let you know that you are in 'limit mode'.

When you are finished with your search, click on the 'RESET' button and the view will return to normal.

When generating documents, Prevail automatically creates the history entries for you. You can also manually insert documents into history. This is normally done if you want to track incoming as well as outgoing documents. To manually insert a document into history, click on the 'Insert' button at the top of the screen. An entry window will appear that lets you enter information on the new document (e.g. description, date, etc.). There are pull-down arrows on the 'Code' and 'Description' fields to speed data entry. The code is simply a 3-letter category that lets you designate documents by type. The description is a one-line explanation of what the document is. Note that there is also a detail field which gives you space to enter a brief description of the document. Below the 'Detail' is a field called 'File Name'. If your firm scans incoming documents for archival purposes, you can link the scanned document to this entry by clicking the 'Choose' button, locating the file, then opening it. When you select this entry in the document history from now on, you can click the 'View' button to open it in the related application. Click the 'Done' button to save the entry.

Notice that there is also a 'Delete' button next to the 'Insert' button. You can use this button to delete any history entries that were made in error.

If you enter all of your incoming documents into history, you can easily glance at the screen to see what has gone out and what has come in. You can also use the 'Limit' feature described earlier in this section to limit the display to documents of a particular type (e.g. doing a search for "RCV" in the "type" field would show only incoming or received documents). You can also sort each column by clicking on the title of the column. An arrow will appear pointing up or down, depending on whether the sort is ascending or descending.

Custom Information

The 'Custom Information' page is used for storing information your firm needs, but does not come with Prevail. There are eighteen custom fields available for use. Each law type, social security and personal injury, has its own set of custom labels, so essentially there are thirty-six custom fields available, but only eighteen per case. You can setup your custom labels for social security cases by choosing Data Bank→Social Security→Custom Field Labels. Give each field a name and click the 'Done' button to save them. You can also do the same for personal injury cases by choosing Data Bank→Personal Injury→Custom Field Labels.

When you view a social security or personal injury case, the proper set of labels will appear on the 'Custom Information' page according to law type.

Fields that do not have a label associated with them are not available for input. All of the custom fields are character fields, meaning you can enter any text into any of the fields. To update the custom fields information, click the 'Update' button. Fields that has a label next to them will change to yellow to let you know that the field can be edited. To save changes, click the 'Done' button. To discard changes, click the 'Cancel' button.

Chapter

4

The Interface

Adding a friendly user interface to a complex case management system

P revail has always been known for its simple point and click user interface. Although this version of Prevail looks like a whole new program, it still has the feel of previous versions. Perhaps more than anything, the interface has been cleaned and rejuvenated while adding important conformity features, keyboard equivalents, new menus, and new buttons.

Universal Interface Features

There are a few new features that you will notice immediately, and some that you cannot see. One major non-visual feature change from previous versions of Prevail is the keyboard equivalents that have been added to every window. Before we begin to examine the Prevail interface, there are few things you should know about navigating through Prevail.

- Pressing the Esc (Escape) key on the keyboard will cancel and close all windows as if you clicked the X in the upper right hand corner. It will also cancel any update. For instance, if you click the 'Update' button to edit a client's information, pressing the Esc key will cancel the update like clicking the 'Cancel' button.

- Pressing the F12 key on the keyboard will save and close most windows that require input. This is similar to clicking the 'Done' button. This is also true for the main Prevail window.

- Any button or menu item that has a letter underlined in the name of the item, such as the 'Update' button can be pressed or selected by pressing the Alt key and the letter or number that is underlined. For instance, pressing Alt+U on the 'Client Information' page would put the system in update mode for editing.

- When updating or inserting new information on the main Prevail window, the input fields will change color to notify you that it is in update or insert mode. When updating, the fields will turn yellow. When inserting, the fields will turn green.

- When searching for keywords in appointments, to-dos, document history, costs, and time, if a match is found, the grids will turn purple to notify you that you are in a limit mode. To return to a regular view, you must click the 'RESET' button (that used to be the 'Search' or 'Limit' button).

- Nearly every grid in Prevail has the ability to sort data in a column ascending or descending by clicking on the name of a column. An arrow will appear next to the field that is currently used for sorting. An up arrow means the data is in ascending order. A down arrow means the data is in descending order. If you click a field and an arrow does not appear, it means that you cannot use that field to sort.

- If the selected field is a drop-down box (a box with a down arrow on it), you can sometimes add items to that drop-down list by pressing the Insert key on the keyboard. For instance, if you are on the 'Client Information' page and the currently selected field is 'Language', you can press the Insert key to insert a new language into the list. You may also have noticed that the 'Insert' button was enabled when you entered that field.

- Pressing the Tab key will cycle through the input boxes and buttons on every window.

- Standard Windows copy (Ctrl+C), cut (Ctrl+X), paste (Ctrl+V), and Undo (Ctrl+Z) keystrokes work when applicable.

Prevail Login

If you have more than one user using Prevail, the first window you will see when you run Prevail is the Prevail Login. This window allows you to choose a user to login as. The 'Login' button will login to the system with the currently selected user. The 'Exit' button will close Prevail. If you click on the 'http://www.prevail.net' text, the Prevail Network web site will open in your default web browser.

The Prevail Window

The Prevail window is main window of Prevail. It contains a title bar, main menu, toolbar, page name, navigation bar, and all of the tabs for the different information views. Every possible window or function can be reached via the Prevail window. Getting to know the Prevail window will greatly pay off in the long run.

Title Bar ———→

Main Menu

Toolbar

Page Name

Navigation Bar

Page Content

Tabs
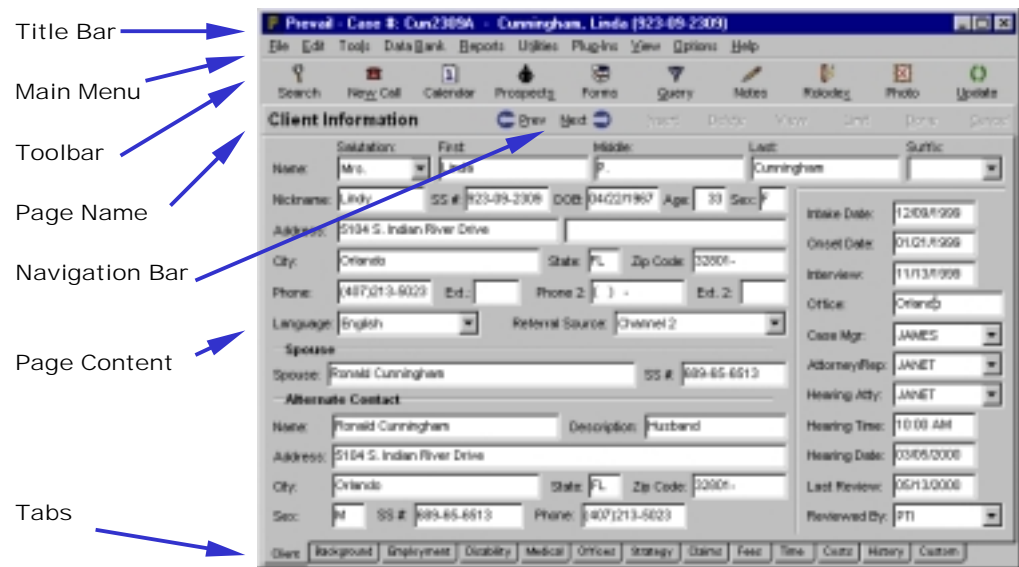
Title Bar
The Title Bar displays information such as the current case number, the client's name or case name, social security number, and if viewing closed files, the date the file was closed.

Main Menu
The main menu houses access to nearly every function or window in Prevail. Some functions in Prevail can only be accessed via the main menu.

File Menu

- **New Client:** Add a new prospect to the system

- **New Appointment:** Schedule a new appointment

- **New To-do:** Create a new to-do
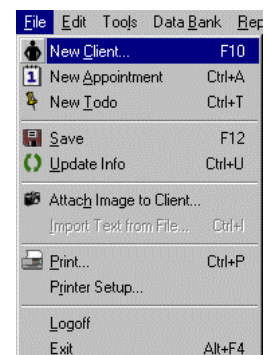
- <u>Save:</u> If in update or edit mode, this will save the changes (similar to clicking the 'Done' button

- <u>Update Info:</u> Puts the system into update mode (similar to clicking the 'Update' button)

- <u>Attach Image to Client:</u> This will add an image file to the client's photo journal

- <u>Export as Text:</u> This will export the current page's information to a plain ASCII text file. This is useful for inserting text into documents.

- <u>Import Text from File:</u> If the currently selected field is a memo field (big input box), this item will allow you to copy the contents of another file into the memo field. This would be like opening a text file in Notepad and copying and pasting the text into Prevail.

- <u>Print:</u> This will print the current page. All pages in Prevail are printable.

- <u>Printer Setup:</u> Used to configure the printer.

- <u>Logoff:</u> Logout of Prevail. This will not exit Prevail. It will take you back to the Prevail Login window.

- <u>Exit:</u> Quit Prevail

Edit Menu

- <u>Undo:</u> Undo the last edit

- <u>Cut:</u> Copy the selected text to the clipboard and delete the text

- <u>Copy:</u> Copy the selected text to the clipboard

- <u>Paste:</u> Paste the text from the clipboard at the cursor

- <u>Delete:</u> Delete the selected text

- <u>Select All:</u> Selects all of the text in the selected input box
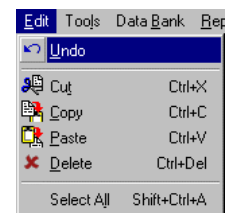
Tools Menu

- <u>Quick Search:</u> Opens the Quick Search window to search for a client's first or last name

- <u>Power Search:</u> Opens the Power Search window for more advanced searches

- <u>Closed Prospects:</u> Opens the Closed Prospects window to view the closed prospects

- <u>Open Prospects:</u> Opens the Open Prospects window to view all currently opened prospects

- <u>Chat:</u> Allows you to text chat with other users running Prevail

- <u>Digital Photo:</u> If the current client has a photo journal, it will open the Photo Journal program. If the client does not, it will open a capture program that allows you to take a picture of your client

- <u>E-Mail:</u> Opens your selected e-mail program

- <u>Forms/Letters:</u> Merge a form or a letter

- <u>Notes:</u> Opens the cases' running notes

- <u>Query:</u> Run a predefined query to limit client list

- <u>Rolodex:</u> Opens the rolodex

- <u>Calendar:</u> Opens the calendar

- <u>Set Reviewed Date:</u> Sets the review date and reviewer of the current case

- <u>Sticky Note:</u> Allows you to add or show a pop-up notes window that will appear whenever you choose that client

- <u>To-Do's:</u> Opens the calendar to the To-Do tab

- <u>Zip Codes:</u> Allows you to search for a city and state by entering the zip code
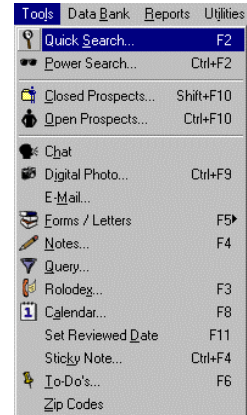
Data Bank Menu

- <u>General:</u> Contains a sub menu that allows you to add, edit, or delete case managers, cost codes, document types, firm attorneys, firm information,

languages, medical providers, medical provider types, referral sources, salutations, suffixes, and zip codes

- <u>Personal Injury:</u> Contains a sub menu that allows you to add, edit, or delete case statuses, case types, circuit courts, personal injury custom field labels, damage types, insurance providers, investigative agencies, opposing counsels, and related parties

- <u>Social Security:</u> Contains a sub menu that allows you to add, edit, or delete ALJ offices, claim types, social security custom field labels, examiners, federal district courts, fee codes, LTD providers, and SSA offices

Reports Menu

- <u>Launch Prevail Reporter:</u> Opens the Prevail Reporter if installed

- <u>Import Report:</u> Import reports created by PTI

- <u>Refresh Reports:</u> Reloads the reports

- <u>Reports:</u> A list of reports currently in the system will appear grouped by folder
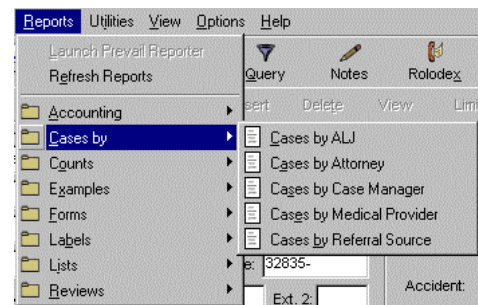
Utilities Menu

- <u>Assign Offices:</u> If the current case is a Social Security case, the Assign Offices item will appear. Choosing Assign Offices will automatically select the SSA Office, DDS, and OHA based on the client's zip code.

- <u>Case Summary:</u> Shows the Case Summary window

- <u>Change Case Number:</u> Allows you to change the user-defined case number for the current case

- <u>Claims Utility:</u> Opens the Claims Utility to edit the claims process

- <u>Close Current Case:</u> Closes the current case

- <u>Export Database:</u> Exports the entire Prevail database to comma delimited text files

- <u>Load Closed Files:</u> Opens the closed cases for viewing
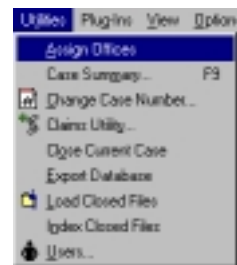
- Index Closed Files: Indexes the closed cases table

- Users: Opens the User Utilities to add or remove users

View Menu

The View menu allows you to change the tabs for the current case type. The image to the right shows the View menu when the current case is a social security case. The currently selected tab will appear bold.
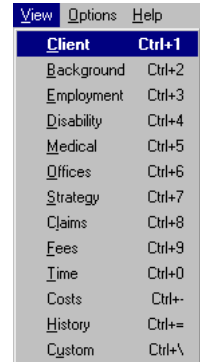
Options Menu

- Properties: Opens the Properties window for user preferences such as prompting when exiting, default queries, and startup options

- Settings: Opens the Prevail Settings to change information such as server type, Prevail path, word processor information, and e-mail application

- Print Field Code List: Prints the field code list for open clients

- Print Prospect Field Code List: Prints the field code list for open prospects

Help Menu

- Prevail Network: Opens the Prevail Network web site in the default browser

- What's New?: Opens a text file that has the latest changes and news regarding the version of Prevail

- About: Opens the About window for information such as version number, licenses, and Prevail path
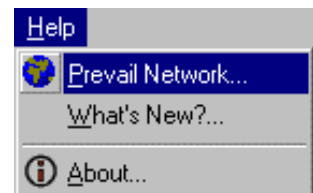
Toolbar

The Prevail Toolbar, located under the main menu, allows simple one-click access to common Prevail features. To access a feature via the toolbar, simply click on the button you wish.
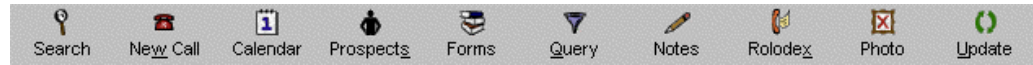
- • <u>Search:</u> The search button will show the 'Quick Search' window used to search for a client's first or last name

- • <u>New Call:</u> The new call button allows you to add a new prospect to the Prevail system

- • <u>Calendar:</u> The calendar button will show the Prevail Calendar

- • <u>Prospects:</u> Clicking the Prospects button allows you to view the open prospects list

- • <u>Forms:</u> The Forms button allows you to merge a letter or SSA form for the current case

- • <u>Query:</u> The Query button allows you to limit the current case list by using an xBase expression

- • <u>Notes:</u> Click the Notes button to access the case notes for the current case

- • <u>Rolodex:</u> Click the Rolodex button to view contacts

- • <u>Photo:</u> If the current case has a photo journal, the Photo button will open the Photo Journal program. If the current case does not have a photo journal, the photo button will allow you to take a picture of the client

- • <u>Update:</u> The Update button allows you to edit the information on the current page

Page Name
The Page Name displays the current page's name.

Navigation Bar
The Navigation Bar provides navigation between cases, and functions such as inserting, deleting, viewing, limiting, saving, and canceling.

- <u>Previous:</u> Moves to the previous case

- <u>Next:</u> Moves to the next case

- <u>Insert:</u> Inserts a new item to the selected input boxes list, or items such as employers, time entries, fee entries, or cost entries

- <u>Delete:</u> Deletes the selected item on pages where applicable

- <u>View:</u> Used to view a document on the 'History' page

- <u>Limit:</u> Limits the items that are viewed on pages such as 'Time', 'Costs', and 'History'

- <u>Done:</u> Saves the changes made during an update

- <u>Cancel:</u> Cancels the changes made during an update and reverts all data to its previous state

Page Content

The Page Content is where the cases information is displayed. As you move between pages, the views will change according to the tab you have selected.

Tabs

The Tabs, located along the bottom of the Prevail window, are used to organize and display case information. Changing tabs will cause the page content to change to the corresponding information. Each law type, social security and personal injury, has its own set of tabs. As you move between clients, notice that the tab set changes as the law type changes. For information on what each tab is used for, see the chapter title 'Guided Tour'.

Calendar

For information regarding the Calendar, please see the chapter titled 'Calendar'.

Claims Utility

The Claims Utility is used to modify the social security claims process. For information regarding the Claims Utility and the Claims Utility interface, please see the chapter titled 'Social Security'.

Case Notes

The Case Notes contains a running log of information that has been entered about the current case. Whenever an entry is made, the date and time, as well as the user's login, is automatically recorded. Prevail can also record time, cost, document, appointment, to-do, and hearing entries. You can import notes from a text file, export the notes, as well as search and replace. The Notes also has the ability to do standard text formatting, including fonts, font color, font size, and alignment. The notes can also be printed for archival purposes. Exporting the notes will copy the notes to file, and store them in the cases history folder, as well as create a document history entry.
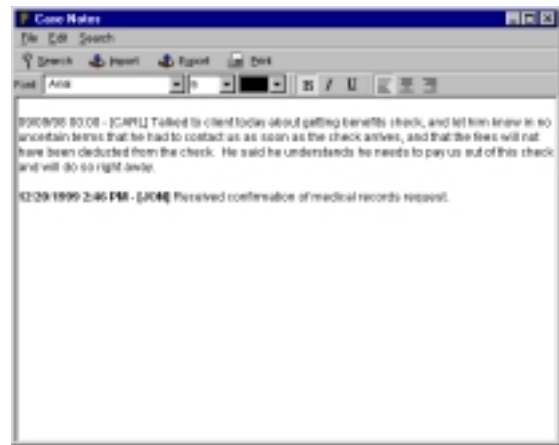
Rolodex

The Rolodex is used to store all of your contact names, addresses, and phone numbers. Along the top of the window are a series of buttons with the letters A-Z. These buttons are used to navigate through your contacts by a last name or company name. For instance, to view a contacts whose last the last name begins with 'A', click the 'A' button. Noticed that the button remains in the down position. This signifies that you are viewing the clients with a last name that begins with 'A'. Click the 'New' button to add a new contact. Fill in the information, then click 'Save' button to save the contact. Click the 'Cancel' button to cancel adding the new contact. To delete a contact, navigate to the contact, select the contact, and click the 'Delete' button.

User Utility

The User Utility is where you add and delete users from the Prevail system. In order to add or remove the user from the system, you must have 'Super User'

security. The 'Prevail Users' list located on the left side of the window, displays a list of all users currently in the system. To add a new user to the system, click the 'New' button. Fill in the information, then click the 'Save' button to save the user, or click the 'Cancel' button to cancel adding the user to the system. When adding a user, make sure that the 'Login' of the new user is unique, and does not exist in the 'Prevail Users' list. When finished with user utilities, click the 'Done' button.

Chapter

5

Social Security

Using Prevail to manage your Social Security practice

P revail contains a number of powerful tools designed specifically to process and track Social Security Disability claims. This chapter will address the capabilities of those tools and discuss in general terms how they can be used to manage your Social Security Disability practice. Keep in mind that Prevail itself is nothing more than a tool – or, more specifically, a toolbox. Any good mechanic relies heavily upon his tools, but must know which tools to use for which purpose. Managing your practice, like fixing an engine, requires that you know how to select the proper tool and use it appropriately. Hopefully, this chapter will give you enough insight into the tools that come with Prevail to figure out which ones you are going to use most often, and how you are going to use them.

There will be no step-by-step, "how to" descriptions in this chapter besides the section on the Claims Utility. We are assuming that you can handle the logistics of mouse clicks and know your way around the Prevail windows and tabs. If you do not, you can always refer to other sections of the manual to get the specific details of what button to press and when to press it. Here, we are strictly looking at the big picture.

Auto SSA Offices

Prevail 3.9.2 has the ability to automatically select a client's SSA office, Disability Analyst (DDS), and ALJ/OHA by using the client's zip code. This is done when a prospect is activated. Therefore, you must enter the prospect's correct zip code before activation for the auto SSA feature to work. If the zip code is blank at activation, an arbitrary SSA office will be selected, or none at all.

If you would like to reassign the offices for existing clients, or if you don't know a prospect's zip code, you can assign the offices at any time by choose Utilities→Assign Offices.

Claims Tracking

This tab is the single most important tracking mechanism for Social Security cases. The 'Claims' tab for each case contains an exact chronology of every step in the Social Security claims process. If you have got a case at the hearing level, you can glance at this screen and tell instantly when the hearing is going to be. You can also see the date it was scheduled, the date it was requested, the date the reconsideration was denied, the date the initial application was denied, and so forth. Instead of just telling you where the claim is now, Prevail tells you everything that has happened with the claim up until this point, as well as what is expected to happen next. Many of the routine "what's going on in my case" calls you get from your clients can be answered with a quick glance at this page.

One of the most significant features of this page is the fact that you can define the steps in the process yourself. When you first install Prevail, it will contain the basic steps in the appeals process (e.g. application denial, request reconsideration, await decision, request hearing, await hearing date, etc.). That is plenty for many firms – but others like to insert their own steps along the way using the Claims Utility (specifics of which are detailed in a following section of this chapter). The Claims Utility allows you to insert each of the actions that you think are relevant to a claim. When your staff updates the status of claims along the way, they choose from the steps that you have defined.

There are two ways to update the status of a claim. The first is to simply click on the 'Update' button, and pick whichever of the pre-defined possibilities is appropriate for the next step of the current claim. For each step in the process, Prevail knows all of the possibilities of what can happen next. You simply pick the one that actually happened, and you are done. If there are any statutes associated with the step (e.g. reconsideration has been denied and you have sixty days to request a hearing), Prevail will automatically calculate the statute date and create a to-do item 10 days ahead of time to remind you (the case manager) that the statute is approaching.

The other way to update a claim is to simply use the Prevail forms generator to create whatever form is appropriate to move the claim to the next level. For example, if reconsideration has been denied in a case, you can automatically move the case from the "Reconsideration Denied" stage to the "Request for Hearing Sent" stage by clicking on the 'Forms' button, choosing 'Forms' from the drop-down menu, and generating a 'Request for Hearing' form. Remember to do one or the other, but not both. If you use Prevail to generate the form, it will automatically update the claim status. You do not need to do it manually. If, on the other hand, you want to fill out the form manually instead of doing it in Prevail, remember to click 'Update' on that claim, and advance the claim to the next level.

If you should happen to make a mistake when updating a claim status, remember you can fix it by highlighting the incorrect entry and clicking the 'Delete' button. The last entry will disappear, but the rest of the claim chronology will be left intact. You can then click on the 'Update' button again to update the claim to the correct level.

Multiple Claims

You may have noticed that the 'Claims' tab in Prevail has selector buttons for Claim 1, Claim 2, and Claim 3. Most of the time you will be dealing with a single claim (even if it is a concurrent SSI/DIB claim) and tracking it as such. There are times, however, when you will want to create a new claim. Let's assume, for example, that you have a claim that is gone all the way to the Appeals Council level. Even if you plan on taking it all the way to Federal Court, it is often a good idea to re-file at the initial level. In this case you would do that by clicking on the button beside Claim 2 then clicking the 'Update' button. You will be prompted to start a brand new claim. The new claim (Claim 2) can now be tracked independently of the original claim. Just remember to select the correct claim before making any future updates. Prevail will help you remember that there is more than one claim active in this case by putting a dot to the left of the claim number for any active claim. If you pull up a case and only see a dot beside Claim 1, then that is the only one that exists. If you see dots beside Claim 1 and Claim 2, then there are two active claims in the current case. It is rare that you will need Claim 3, but it does happen.

Claims Utility

The Claims Utility is used to create, modify, and remove steps from the Social Security claim process. Prevail ships with a default set of steps, but most firms find the need to tailor this process specifically for their firm. The claims process is one of the more important features for Social Security firms. If you are a new user to Prevail, it is recommended that you first plan how your firm will handle claims and then edit the claims process to reflect your needs before you start to add clients into Prevail. Once you begin to enter clients into Prevail, it becomes increasingly difficult to process all clients in the same manner. To view the Claims Utility, choose Utilities→Claims Utility from the main menu.
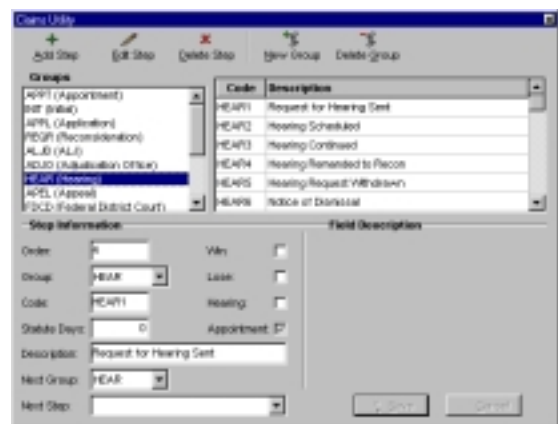
Prevail uses groups (levels) and steps to make up the claims process. Each group should be considered a "level" in the claims process, and each step in a level should be pertinent to a process that takes place at that particular level. For instance, all steps that can possibly happen at the hearing level of a claim should be in the HEAR group. Because of backwards compatibility issues, a group can only consist of four characters. Prevail 3.9 adds a description of a group, but merely for aesthetic purposes. Select a group to see the steps in that group.

Modifying the Process

After you have looked through the default process, determine whether you would like to start from scratch, or modify the existing process to your specifications. If you want to start completely from scratch, you will need to delete each step in every group, then each group.

Think of the claims process as a "Connect the Dots" with words. You will always have a starting point in the process. From there, you point to the next step until the process reaches the end. Using the default process, the starting point would be the APPT, appointment group. The first step is 'Appointment Set'. After the 'Appointment Set' step, the next step would be to send the application. So, looking at the 'Appointment Set' step, the next step would be 'Application Sent' in the APPL (Application) group. The default process breaks down as follows. If there is not an exit at a particular step, it is understood that the next step remains in the current group.
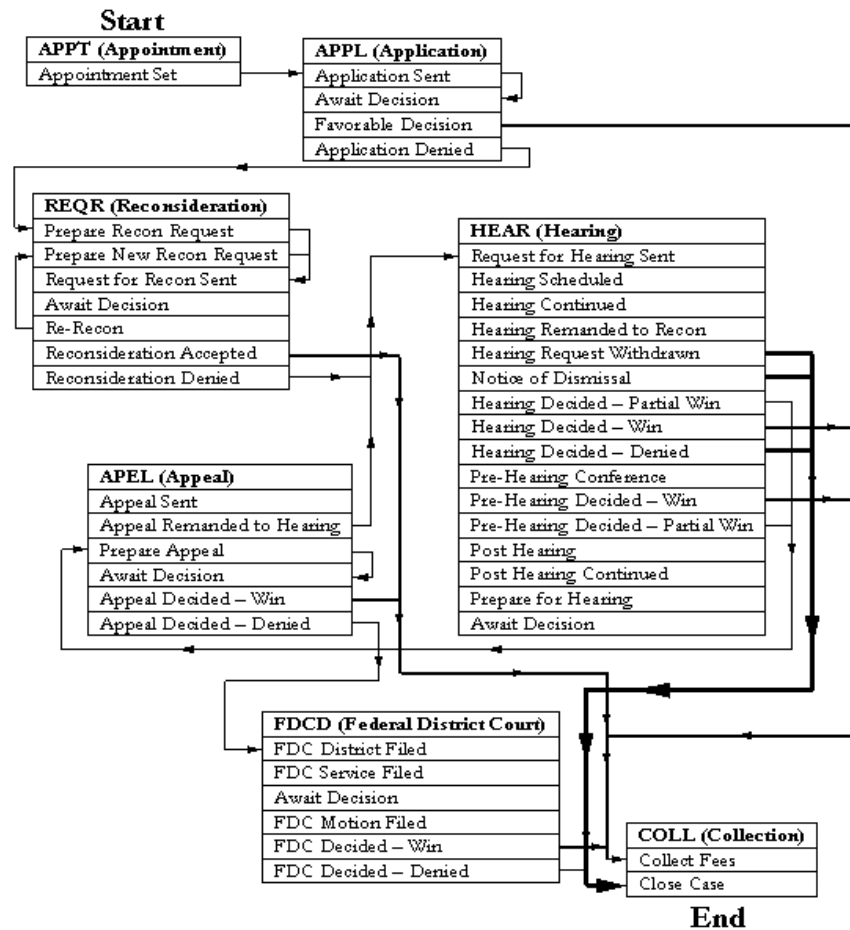
Creating a Group

To create a group, click the 'New Group' button. You will be prompted to enter the four-character group code (such as APPT). The group code should be unique. After you enter the group code, click the 'OK' button and you will be prompted for the description of the group. Enter the description and click the 'OK' button.

Adding a Step

To add a step to the claims process, choose the group that the step should belong to and click the 'Add Step' button. If the group does not exist, you will need to create it before adding the step. Notice that the 'Order', 'Group', and 'Code' fields are automatically set by Prevail. More than likely, you will not have to edit these fields. As you move from field to field, look at the

'Field Description' on the right side of the window. The 'Field Description' describes what each field is used for. The 'Next Group' and 'Next Step' fields refer to what should be displayed as the next step when you are looking at a client's claim tab. The 'Next Group' is used to show the correct group when you choose to update a claim. Click the 'Save' button to save the step. If you do not want to save the step, click the 'Cancel' button.

Editing a Step

Select the group and step, and click the 'Edit Step' button. Make your changes and click the 'Save' button to save the changes. If you do not want to save the changes, click the 'Cancel' button.

Deleting Steps and Groups

When deleting steps, make sure that they are not used by cases. It is generally not a good idea to delete steps unless you have just started to use Prevail and have not entered any clients. The repercussions of deleting a step are missing and blank entries in claims. To delete a step, simple select it and click the 'Delete Step' button.

If you want to delete a group, make sure you do not need the group any longer. Deleting a group will not delete the steps in the group. However, if you do delete a group, the steps will not be available until the group is added again. Select the group and click the 'Delete Group' button.

Document History

Another powerful tool for tracking what goes on in a Social Security case is the 'History' tab. You may have noticed from merging documents that every single document you create in a case is automatically listed in the document history for that client. This is very useful in and of itself because you can instantly see who created what

documents when. You can instantly retrieve those documents by highlighting the desired document description and clicking on the 'View' button. Prevail will get the document for you automatically. You do not have to search through directories, try to remember what the document was called, or where it was saved.

Most effective use of the 'History' page, however, involves tracking both outgoing and incoming documents. Outgoing documents, of course, will take care of themselves. Incoming documents, on the other hand, require a little bit of help from you. All you have to do is log them into history when they arrive.

It takes maybe fifteen seconds to log a document into history. All you have to do is click the 'Insert' button on the history page and enter your description of the received document. Make sure you indicate the correct document type (e.g. Medical Records, Received Mail, etc.), and enter a one-line description of the document. The date will default to today's date, but if the document was actually received on a date other than today, you can change the date field.

Generating Time and To-Do Entries

Prevail can also create time and to-do entries for incoming documents. If you want those entries to be created, simply enter the desired values in the 'Hours' and 'Response Date' fields when inputting your history item. If you put 0.25 in the 'Hours' field, an entry will be automatically made on the 'Time' page for a quarter of an hour. The entry on the 'Time' page will read "PROCESS:____", where the blank line will be replaced by your description of the incoming document.

If you enter any date other than today's date in the 'Response Date' field, Prevail will automatically generate a to-do item for the user whose name appears in the 'Case Manager' field on this history entry. You can set the to-do for any user (not just the same manager) by selecting their name. It will not make them the case manager in this case. It just redirects the to-do entry to the appropriate list.

After you have let Prevail make an automatic to-do entry, the reminder will show up on the specified user's To-Do list on the date specified in the 'Date' field. Keep in mind when selecting the response date that the to-do entry will not appear on any to-do list until that date has been reached. For this reason, you have to be careful with your dates. For example, if you received a document that requires a response from you within thirty days, make the 'Response Date' something less than thirty days, so the warning shows up far enough in advance on the to-do list for the user to prepare the response. It is a good idea to indicate the actual due date in the 'Description' field, then set the 'Due' date to something like ten days earlier than that date. This way you can glance at the entry and see the actual due date, but the reminder shows up on the to-do list sometime earlier. Just be careful when setting dates that you do not use today's date as the due date, because Prevail will not set a reminder. If you want the reminder to show up immediately (or almost immediately), set the due date to tomorrow's date.

Using Limit

Once a case has been going on for a while, you will have quite a few documents listed, particularly if you are listing both incoming and outgoing documents. You can very quickly sort through all these entries to find what you are looking for if you use the 'Limit' button. This button serves as a filter. You set a filter criteria and tell Prevail where to apply it, and Prevail will filter out all documents that do not meet the criteria you specified, displaying only those that meet the criteria. For example, let's say you are talking on the phone to someone from Dr. Jones' office about medical records you have requested. Suppose they say you have never requested medical records. You could very quickly click the 'Limit' button and put the word "Jones" in your search criteria for the description field. Any letter to Dr. Jones (including requests for medical records) will show up. Incoming documents from Dr. Jones, including medical records, would also be listed here. You could very easily tell Dr. Jones office when you sent the request, what was received and what is still outstanding.

Let's try another example. Suppose you want a list of all medical records you have received in a case. You could click on the 'Limit' button and search for 'MED' in the 'Type' field. Since 'MED' is the type for medical records received, all received records would show up, but nothing else would. To print a list of all medical records you have in your possession, you could simply print the history while the limit was applied. Only those items matching the limit would appear on your printout.

SSA Forms Production

Many people get hung up on the logistics of printing and submitting SSA forms, and end up placing too much emphasis on them. Prevail has the capability to merge client data into the forms automatically, but the world isn't going to end if you don't use it. Some firms like to use SSA-provided hard-copy forms and have the clients sign them all at once during their initial intake. There is nothing wrong with that. If you are comfortable doing that and you either have the client fill out the forms or don't mind filling them out yourself, so be it. Just make sure that when you submit a form to the SSA, you update the Claims page in Prevail

accordingly. Prevail knows when you use it to generate a form, but it doesn't know when you use the typewriter.

The signature issue needn't be a big one. Most SSA forms can be signed by either the claimant or the representative, so beyond the initial Appointment of Representative, you don't need the client's signature. If you're really hung up on the issue of the client's signature, then scan it and attach the scanned image to the client's file using "Attach Image to Client" under the file menu. You can then drop the scanned signature into the document using Microsoft Word or WordPerfect when you merge the form.

Using the Calendar Effectively

The Prevail Calendar has some very powerful search functions that will save you a lot of time if you use them correctly. For example, if you want to print a list of all hearings you have coming up in the next month, you can simply pull up your calendar, execute a search, and print the results.

The Calendar search function works very much like the limit function in Document History. You simply enter the search criteria and then tell Prevail which field to apply the search criteria to. In the Calendar, you have the additional capability to enter a date range for the search. If you do not specify a date range, it will default to one year from the current date. Once you execute the search, a list of all matching appointments will be displayed. You can print the list by simply clicking on the 'Print' button.

Remember that you need to be very consistent in your data entry for calendar searches to work effectively. When Prevail automatically places a hearing on your calendar, it uses the word "Hearing". If you put your own hearings on the calendar using the abbreviation "Hrg." instead of the word "Hearing", then you will run into trouble. There is no way a single search could find both "Hearing" and "Hrg." – you would have to do two separate searches to find them all. You can avoid inaccurate searches or duplication of effort by simply agreeing in advance on the terminology your office is going to use, and using it consistently.

Also keep in mind that when you do a search in the Prevail Calendar, you are only the currently selected view. For example, if your 'View' is set to 'USER', and the name JOHN is the current user, then you would only be searching John's calendar for hearings. If you want to search all calendars, make sure you have the 'Everyone' view selected.

A Note about Notes

Prevail has several kinds of notes available for each case. Which ones you use depend on your purpose for entering them and your style of practice.
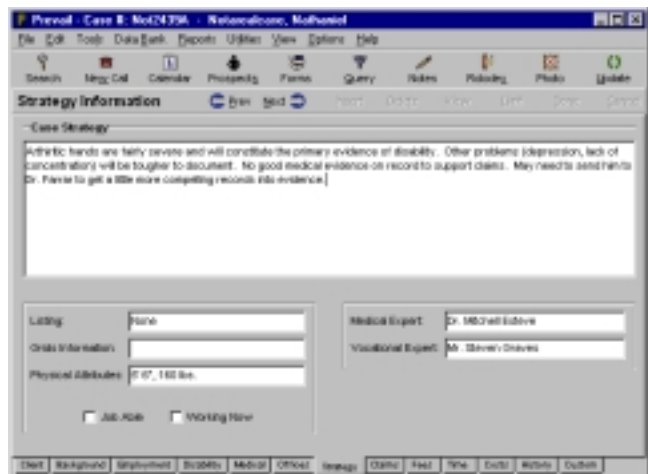
Case Notes

The most commonly used notes are the 'Case Notes', which can be accessed by clicking the 'Notes' button, or pressing the F4 key from any client data page. This function automatically plugs in the date, the time, and the user making the notes entry. You are then given as much space as you need to type your note. These notes are most commonly used for making comments about client contact or storing late-breaking news about a case. It is also helpful to cut-and-paste email and phone messages about the client into these notes, since that allows you to record pertinent information without re-typing anything. Case notes are designed for general, "what's going on in this case" type of information.

Strategy Notes

There is, however, another place to put notes about a case. If you look on the 'Strategy' page of any Social Security case, you will find a large memo field called 'Case Strategy'. You can put notes here too, but this area is intended for attorney notes about the theory or strategy of the case. This is where you can detail a blueprint of your case. Where are you going with it? What issues are you going to pursue? It's helpful for your staff to know what you were thinking about a case when you signed it up. It is also helpful if another attorney has to cover a hearing or deposition for you. Another person should be able to read through these notes and get a good idea of what the case is all about. They are unlimited in length (if you type more than fits in the window, it will scroll), and

there is a field code for this notes field, so you can include them in a pre-hearing worksheet if you want.

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Because Social Security clients tend to call and ask what is going on so frequently, it is very easy to become reactive instead of proactive when tracking their case. You never forget about the ones who call every week. It's the rare ones you never hear from that are most likely to have something fall through the cracks and get forgotten. Since the 'Date Last Reviewed' update can only be triggered by a specific human action, any case that is in danger of "falling through the cracks" will show up on the 'Date Last Reviewed' aging report. All of the Prevail reports are user-definable, so you can custom your aging report to suit your own preferences.

Prevail Reporter

The data in your Prevail system is much more meaningful when you can create lists and reports to help you manage your practice. The Prevail Reporter contains a variety of useful reports for this purpose. You can print case lists sorted and counted by a variety of criteria (claim status, referral source, attorney, etc.). The reports won't mean much until you get all your client data in there, but take a minute to look at some of the reports that come with Prevail early in your implementation process. You will get a feel for what Prevail can do, and looking at the existing reports will give you ideas for others that you might want to create. Remember to check The Prevail Network at http://www.prevail.net for new reports. We do a lot of special reports for our clients, and we generally put them out on our website so they are available for download. If you have an idea for a report but can't quite figure out how to make it work, give us a call. Chances are we already have something very similar to it and can simply send it to you or post it on our web site.

Chapter

6

Personal Injury

Personal Injury

P revail contains a number of powerful tools designed specifically to process and track personal injury claims and litigation management. This chapter will address the capabilities of those tools, and discuss in general terms how they can be used to manage your personal injury practice.

Keep in mind that Prevail itself is nothing more than a tool – or, more specifically, a toolbox. Any good mechanic relies heavily upon his tools, but must know which tools to use for which purpose. Managing your practice, like fixing an engine, requires that you know how to select the proper tool and use it appropriately. Hopefully this chapter will give you enough insight into the tools that come with Prevail to figure out which ones your firm is going to use most often, and how your firm is going to use them.

There will be no step-by-step "how to" descriptions in this chapter. We are assuming that you can handle the logistics of mouse clicks, and know your way around the Prevail pages. If you do not, you can always refer to other sections of the manual to get the specific details of what button to press when. Here we are strictly looking at the big picture.

Plaintiffs

Regardless of where you practice, a personal injury claim is going to have one or more plaintiffs and one or more defendants. In Prevail, it all starts with the Plaintiff. When you put in your basic information in the 'New Call' section of Prevail, the first thing you put in is the Plaintiff information. Sometimes your client is the injured party, and sometimes not. Note that on the Plaintiff page there are separate fields for client and injured party information. If the injured party is different than your client (e.g. the injured party is deceased or a minor), make sure you enter your data accordingly in the injured party fields.

The rest of the fields on the Plaintiff page are for the most part self-explanatory. On the right side of the screen you will see several critical dates (e.g. statue date, accident date, etc.), as well as fields to indicate whom within your firm is handling the case. Specifically, there are fields for Attorney and Case Manager. Make sure you assign an attorney and a case manager to each case at the very beginning of the case, because a number of warnings and reminders will be automatically generated throughout the life of the case, and the default is for those warnings to go to the Case Manager. If you don't have a Case Manager assigned, they can't be put on the Case Manager's To-Do list.

One of the first things you will need to do before entering your case data is to set up your case types and case status levels under the Data Bank menu option. Prevail lets you define your own case types and associate a statute of limitations for each type of case. If you define a case type and tell Prevail that it carries a 3-year statute, Prevail will automatically calculate the statute based on the date of accident, and warn you 60 days ahead of time (on your to-do list) that the statute is approaching.

You can also define your own entries for case status. Typical entries for this category are "pre-suit", "demand letter sent", "suit filed", etc. – but you can make define your own and track your cases accordingly.

Defendants

Prevail allows you to insert as many Defendants as you like onto the 'Defendants' page. Note that for each Defendant you can select a corresponding insurance company, insurance adjuster and opposing counsel. To add defendants to a case, simply click the 'Insert' button, and type in the information for the new Defendant. Prevail will give you space to put in both individual names and company names. You simply enter whichever is appropriate. If the Defendant is a company, leave the First and Last Name fields blank, and type the company name in the 'Company' field. If the defendant is an individual, type the name in the First and Last Name fields, leaving the Company field blank.

Note that any time you add a defendant to a case, Prevail will automatically perform a conflict-of-interest search. It will search through both open and closed files to see if the Defendant you have entered has been previously represented by your firm as a Plaintiff. Similarly, when you add a new Plaintiff, the system searches through open and closed files to see if the new Plaintiff has ever been a Defendant in a case handled by your firm. While this functionality is enough of a conflict search to get you a discount on your malpractice insurance, it's no substitute for due diligence in screening your cases. There is no good way for the computer to keep you from accidentally suing a friendly doctor or a referral source, so you'll still have to use some other means to check for those situations.

The mechanics of adding and updating defendants is pretty simple. If you want to change any of the information that appears for a particular defendant, simply highlight that defendant in the top window and click the 'Update' button. You can then add or change information about the defendant, insurance adjuster, insurance company, or opposing counsel. If you want to delete a defendant entirely, highlight the defendant in the top window and click the 'Delete' button.

If you handle Worker's Compensation cases, you will want to enter the employer as the Defendant in each case. Prevail gives you four spaces for dates of accident on the 'Accident' page, but that is only for multiple accidents with the same employer. If you have a claimant who has multiple accidents with multiple employers, set up a different case for each employer.

For personal injury cases, it is not at all uncommon to have multiple defendants in a case. For example, in an auto case you might have the adverse driver listed as a defendant, but also have a PIP claim wherein the PIP provider will be listed as a second defendant in the same case. You certainly have the option of entering the PIP suit as an entirely different case, but that is up to you. Neither approach is inherently right or wrong. If you want to keep all the document history and notes together, then list the PIP carrier as a second defendant. If you want them differentiated, enter the PIP suit as a different case.

Court

The 'Court' page in Prevail has several functions. First of all, it allows you to instantly see any hearings that are scheduled in the current case without having to search through (or even look at) the Calendar. There is a place to enter hearings on this page, and all hearings entered through this page will be automatically placed on the appropriate attorney's calendar. If an appointment is added to the calendar and the type is "Hearing", a hearing will be placed on the Hearing tab.

There is also a section on the 'Court' page to select the appropriate judge and court information for this case. This information is pulled out of system-wide databases, so once a judge is entered in the database, he/she will be available in any case.

At the bottom of the 'Court' page are three large memo fields for Style information. These fields are used for entering case style and caption information in your pleadings. For example, if your client is John Smith, your pleadings might need to refer to him as:

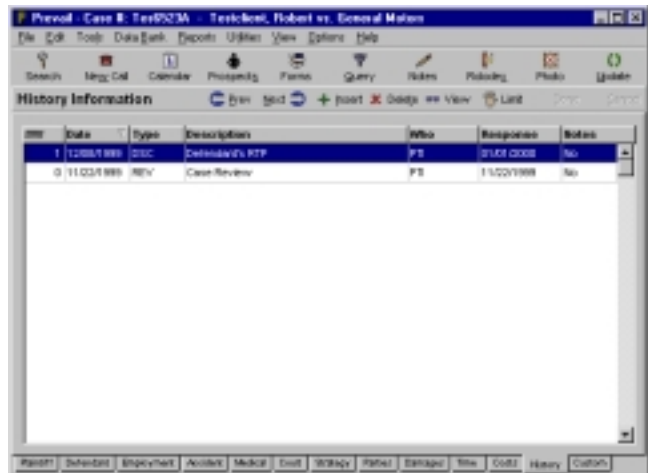> *JONATHAN MICHAEL SMITH, individually and as husband of MARY ELIZABETH SMITH,*
>
> *Plaintiff.*

Since Prevail has fields for the plaintiff name (i.e. John Smith), you can automatically insert that information into letters by putting the appropriate field codes in your letters. Pleadings, however, require different text and formatting requirements, so Prevail has separate fields for the style information. By putting in the appropriate field codes, you can have Prevail automatically create and properly format your case caption information. You use one set of field codes for your letters, and another set of field codes for your pleadings, and each will pull in the appropriate information.

The 'Certificate of Service' field on the 'Court' page allows you to enter ALL names and addresses for parties and counsel of record in one place. This will allow you to enter a single field code at the end of your pleadings that will pull in all the information from this field. That is considerably easier than the alternative of entering a whole bunch of different field codes (one for each part of each name and each part of each address) for the same information. Use this field to enter all names and addresses, formatted exactly as you want them to appear in the 'Certificate of Service' section of your pleadings. Then, when you create your pleadings you can drop in a single field code that will automatically pull all of the information.

Document History

Another powerful tool for tracking what goes on in a personal injury case is the 'History' tab. You may have noticed from merging documents that every single document you create in a case gets automatically listed in the document history for that client. This is very useful in and of itself – because you can instantly see who created what documents when. You can instantly retrieve those documents by simply highlighting the desired document description and clicking on the 'View' button. Prevail will get the document for you automatically. You do not have to search through directories, try to remember what the document was called, or where it was saved.

Most effective use of the 'History' page, however, involves tracking both outgoing and incoming documents. Outgoing documents, of course, will take care of

themselves. Incoming documents, on the other hand, require a little bit of help from you. All you have to do is log them into history when they arrive.

It takes maybe fifteen seconds to log a document into history. All you have to do is click the 'Insert' button on the history page and enter your description of the received document. Make sure you indicate the correct document type (e.g. Medical Records, Received Mail, etc.), and enter a one-line description of the document. The date will default to today's date, but if the document was actually received on a date other than today, you can change the date field.
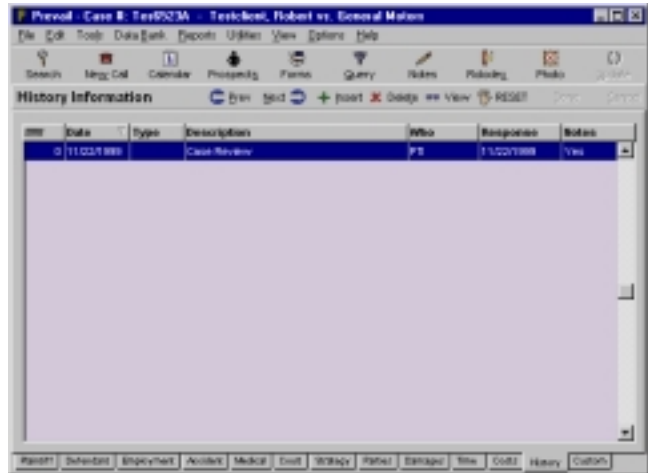
Generating Time and To-Do Entries

Prevail can also create time and to-do entries for incoming documents. If you want those entries to be created, simply enter the desired values in the 'Hours' and 'Response Date' fields when inputting your history item. If you put 0.25 in the 'Hours' field, an entry will be automatically made on the 'Time' page for a quarter of an hour. The entry on the 'Time' page will read "PROCESS:____", where the blank line will be replaced by your description of the incoming document.

If you enter any date other than today's date in the 'Response Date' field, Prevail will automatically generate a to-do item for the user whose name appears in the 'Case Manager' field on this history entry. You can set the to-do for any user (not just the same manager) by selecting their name. It will not make them the case manager in this case. It just redirects the to-do entry to the appropriate list.

After you have let Prevail make an automatic to-do entry, the reminder will show up on the specified user's To-Do list on the date specified in the 'Date' field. Keep in mind when selecting the response date that the to-do entry will not appear on any to-do list until that date has been reached. For this reason, you have to be careful with your dates. For example, if you received a document that requires a response from you within thirty days, make the 'Response Date' something less than thirty days, so the warning shows up far enough in advance on the to-do list for the user to prepare the response. It is a good idea to indicate the actual due date in the 'Description' field, then set the 'Due' date to something like ten days earlier than that date. This way you can glance at the entry and see the actual due date, but the reminder shows up on the to-do list sometime earlier. Just be careful when setting dates that you do not use today's date as the due date, because Prevail will not set a reminder. If you want the reminder to show up immediately (or almost immediately), set the due date to tomorrow's date.

Using Limit

Once a case has been going on for a while, you will have quite a few documents listed, particularly if you are listing both incoming and outgoing documents. You can very quickly sort through all these entries to find what you are looking for if you use the 'Limit' button. This button serves as a filter. You set a filter criteria and tell Prevail where to apply it, and Prevail will filter out all documents that do not meet the criteria you specified, displaying only those that meet the criteria. For example, let's say you are talking on the phone to someone from Dr. Jones' office about medical records you have requested. Suppose they say you have never requested medical records. You could very quickly click the 'Limit' button and put the word "Jones" in your search criteria for the description field. Any letter to Dr. Jones (including requests for medical records) will show up. Incoming documents from Dr. Jones, including medical records, would also be listed here. You could very easily tell Dr. Jones office when you sent the request, what was received and what is still outstanding.

Let's try another example. Suppose you want a list of all medical records you have received in a case. You could click on the 'Limit' button and search for 'MED' in the 'Type' field. Since 'MED' is the type for medical records received, all received records would show up, but nothing else would. To print a list of all medical records you have in your possession, you could simply print the history while the limit was applied. Only those items matching the limit would appear on your printout.

Using the Calendar Effectively

The Prevail Calendar has some very powerful search functions that will save you a lot of time if you use them correctly. For example, if you want to print a list of all hearings you have coming up in the next month, you can simply pull up your calendar, execute a search, and print the results.

The Calendar search function works very much like the limit function in Document History. You simply enter the search criteria and then tell Prevail which field to apply the search criteria to. In the Calendar, you have the additional capability to enter a date range for the search. If you do not specify a date range, it will default to one year from the current date. Once you execute the search, a list

of all matching appointments will be displayed. You can print the list by simply clicking on the 'Print' button.

Remember that you need to be very consistent in your data entry for calendar searches to work effectively. When Prevail automatically places a hearing on your calendar, it uses the word "Hearing". If you put your own hearings on the calendar using the abbreviation "Hrg." instead of the word "Hearing", then you will run into trouble. There is no way a single search could find both "Hearing" and "Hrg." – you would have to do two separate searches to find them all. You can avoid inaccurate searches or duplication of effort by simply agreeing in advance on the terminology your office is going to use, and using it consistently.

Also keep in mind that when you do a search in the Prevail Calendar, you are only the currently selected view. For example, if your 'View' is set to 'USER', and the name JOHN is the current user, then you would only be searching John's calendar for hearings. If you want to search all calendars, make sure you have the 'Everyone' view selected.

A Note about Notes

Prevail has several kinds of notes available for each case. Which ones you use depend on your purpose for entering them and your style of practice.

Case Notes

The most commonly used notes are the 'Case Notes', which can be accessed by clicking the 'Notes' button, or pressing the F4 key from any client data page. This function automatically plugs in the date, the time, and the user making the notes entry. You are then given as much space as you need to type your note. These notes are most commonly used for making comments about client contact or storing late-breaking news about a case. It is also helpful to cut-and-paste email and phone messages about the client into these notes, since that allows you to record pertinent information without re-typing anything. Case notes are designed for general, "what's going on in this case" type of information.

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There is, however, another place to put notes about a case. If you look on the 'Strategy' page of any personal injury case, you will find a large memo field called 'Case Strategy'. You can put notes here too, but this area is intended for attorney notes about the theory or strategy of the case. This is where you can detail a blueprint of your case. Where are you going with it? What issues are you going to pursue? It's helpful for your staff to know what you were thinking about a case when you signed it up. It is also helpful if another attorney has to cover a hearing or deposition for you. Another person should be able to read through these notes and get a good idea of what the case is all about. They are unlimited in length (if you type more than fits in the window, it will scroll), and there is a field code for this notes field, so you can include them in a pre-hearing worksheet if you want.

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report but can't quite figure out how to make it work, give us a call. Chances are we already have something very similar to it and can simply send it to you or post it on our web site.

Calendar

Appointments, to-dos, and views, oh my!

A powerful feature of Prevail is its integrated calendar. The Prevail Calendar is where you can manage your appointments, to-dos, and personal calendar. The Prevail Calendar works at all times in the background without you even realizing it. Whenever you update a social security claim, Prevail automatically creates statute warnings as to-dos. Whenever you schedule a hearing as part of a personal injury case or a social security claim, Prevail automatically adds an appointment to the attorney's calendar. Whenever you merge a document that requires a response, Prevail automatically creates a follow-up to-do. When a Statute of Limitations date changes, so does the statute-warning to-do.

While some firms prefer not to use the Prevail calendar because they already have a system in place, you can't underestimate the time and energy the calendar will save. A common misconception about the Prevail Calendar is that you don't have the ability to schedule for another person in the firm. With the Prevail Calendar, you can schedule appointments or to-dos for any Prevail user in your firm. Not only can you schedule for another user, you can also view another user's calendar, or everyone's calendar at the same time. You can even view a case's calendar. Prevail also has appointment conflict checking to make sure someone doesn't double schedule your time. The Prevail Calendar can become a driving force in your firm's productivity…let's see how!

Opening the Calendar

There are several ways to access the Calendar. The easiest way is to click the 'Calendar' button on the toolbar of the main Prevail window. You may also press the F6 key, press the F8 key, choose Tools→Calendar, or choose Tools→To-Do's from the main menu. The Calendar will open to the appointments view on the current date. You can change the default view when the calendar opens, but we

will cover that topic later. There are seven parts to the Calendar interface, all of which are visible at all times.
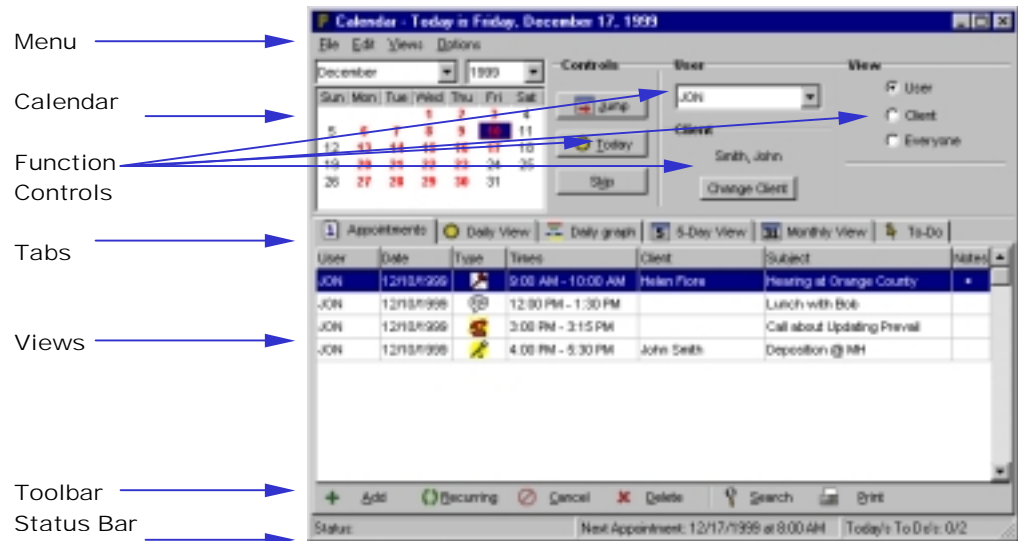
Menu

Unlike the Prevail main menu, the Calendar menu does not have every possible feature on it. The Calendar menu is more of a formality. One important item in the menu that cannot be found anywhere else in Prevail is the 'Scheduler Options' under the Options menu.

Calendar

The Calendar is a graphical view of each month. You can move to a different month by selecting one from the month drop-down box. You can also move to a different year by selecting it from the year drop-down box. Clicking on a day in the calendar will show all data that corresponds with that day. A red day number means that there is a scheduled appointment for that particular day. Using the arrow keys on your keyboard will also move from day-to-day and month-to-month.

Function Controls

The Controls are a series of buttons, drop-down boxes, and radio buttons that allow you to conveniently change dates, users, clients, and views.

Controls

The buttons under the 'Controls' section allow you to quickly move to different dates. Click the 'Jump' button and type in a date in the MM/DD/YYYY format. Click 'OK' and you will jump directly to the specified date.

Click the 'Skip' button and type in a number to skip ahead or back that many days from the current date in the calendar. For example, type in 90 and click 'OK' to skip ahead to the date 90 days from the current calendar date. You can also type in –90 and skip back to the date 90 days before the current calendar date.

To jump to today's actual date, click the 'Today' button. You will be brought right back to today from whatever date you were previously set at.

User

Under the 'User' section, you can use the drop-down box to choose another user's calendar. Click the circle next to 'User' in the 'View' section, then change the user to someone else. You will see everything scheduled for that particular person.

Client

When the 'View' is set to 'Client', you can change the client by clicking the 'Change Client' button. The client name Power Search window will appear. Search for a client's first or last name and click the 'Search' button. Double-click the client you want to view in the calendar.

View

The 'View' section allows you to change whose data you want to view. The 'User' option means you will be viewing the appointments and to-dos for the current user. To view appointments and to-dos associated with a particular client, click the circle next to 'Client'. If you would like to see all appointments and to-dos for every user and all clients, click the circle next to 'Everyone'. Depending on how much you have scheduled, it may be difficult to view all the data. This is a function you would want to use if you were scheduling a meeting for several people and needed to see when everyone was available. Otherwise, you may want to stick with using the User or Client view.

Tabs

Like Prevail, tabs arrange the different calendar views. The 'Appointments' tab will show you the scheduled appointments for the currently selected day in a list format. The 'Daily View' tab is similar to that of a daily planner. It shows the entire day hour-by-hour, or according to the chosen time block. The 'Daily Graph' tab will give you a graphical chart of up to ten user's scheduled activities for the current day. The '5-Day View' shows all appointments for the particular view for the current day and the next four days. The 'Monthly View' gives you a larger monthly calendar. Days with scheduled appointments will have as many appointment descriptions that can fit into a day's box. Resizing the calendar window will stretch out the width and height of each day.

Views

The Views is basically the page content that is showing. By clicking on the different tabs, the content of the pages will change.

Toolbar

Each tab has a different set of buttons along the bottom of the page. The buttons are used to add appointments and to-dos, as well as delete them, print them, and search them.

Status Bar

The Status Bar, located along the bottom of the Calendar, is used to display the status of the calendar (formatting, displaying, printing), when the next appointment is, and how many to-dos are due today.

Appointments

The 'Appointments' is where the majority of the appointment maintenance is done. From the 'Appointments' page you can view the currently selected day's appointments in a columnar report sorted by date and start time. You can add new appointments, set recurring appointments, cancel appointments, delete appointments, search for appointments, and print appointments. First, let's add an appointment.

Adding Appointments

To add a new appointment, click the 'Add' button on the Appointment's toolbar. You can also choose File→New Appointment from the calendar menu, or choose File→New Appointment from the main Prevail menu without opening the calendar. The 'Appointment Details' window will appear with a blank appointment. Choose the user who is to receive the appointment. For this example, choose your user name. The 'Appointment Type' is not necessary, but at times will help you decipher exactly what type of appointment you are looking at. You can customize the appointment types by choosing Options→Calendar Options. See the section title 'Calendar Options' for more information on this. Choose the date of the appointment by typing in the date, or clicking the down arrow and using the calendar control. Set the 'Start' and 'End' time by clicking the up and down arrows next to each field, or using the up and down arrow keys on the keyboard. The time will increase by the default time block setting in the calendar options. If you want Prevail to generate an alarm notifying you of the event, enter a number greater than zero in the 'Remind me' field. The 'Cancelled' box is there to cancel an appointment while keeping a record of it. If this appointment is associated with a case, you can check the 'Attach to Client' box and use the 'Change Client' button to set the client. When viewing the appointment at a later time, clicking the 'Go To' button will move Prevail to that
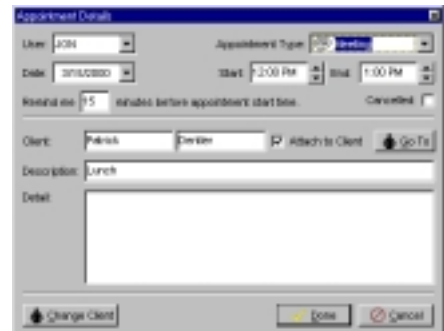
client's file. Enter a description and detail if necessary. It is a good idea to add at least a short description for distinguishing between appointments and search purposes. Click the 'Done' button to save the appointment.

Appointment Alarm

Prevail can notify you when an appointment is approaching. Make sure the 'Enable appointment alarms' option in the Prevail Properties is checked before continuing. When adding or editing an appointment, change the 'Notify me' field to a number greater than zero to turn on the alarm for that event. When the specified number of minutes before the start time approaches, Prevail will make a chime sound and an alarm window will appear.

Setting a Recurring Appointment

A recurring appointment is an appointment that happens on a routine basis. Setting an appointment as recurring saves a lot of time adding the appointments one-by-one. Before you can set an appointment as recurring, you must first add the appointment. Follow the instructions above to add a new appointment. Once the appointment is set, select it and click the 'Recurring' button. There are many options when settings a recurring appointment. You can set the appointment to happen daily, any combination of days a week or bi-weekly, and any day of the month. For this example, select 'Bi-Weekly' as the 'Interval' and set the 'Ending Date' by typing in the date, or clicking the down arrow to use the calendar control. The bi-weekly choice allows you to pick any combination of weekdays to set the appointments for, and whether to start setting the recurring appointments for this week or the following week. Place a check next to 'Monday' and 'Friday' and select 'Start next week'. Since we don't want to overwrite any important appointments, check the 'Do not overwrite conflicting appointments' option, and click the 'Set Recurring' button. You will be asked to confirm the recurring appointment for safety's sake. Click the 'Yes' button to set the recurring appointment. Now, if you scroll through your calendar, you will see every other Monday and Friday highlighted in the calendar.
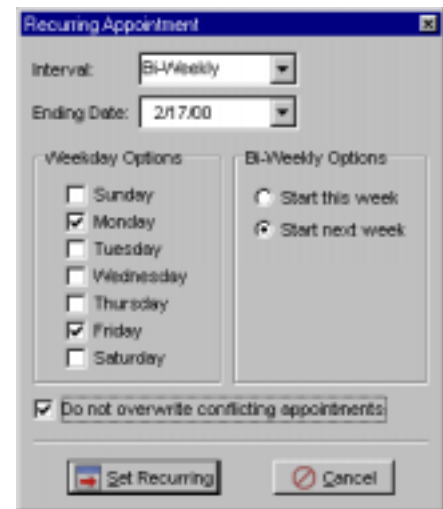
Canceling an Appointment

Canceling an appointment allows you to keep a record of the appointment as opposed to deleting an appointment. To cancel an appointment, select the appointment and click the 'Cancel' button. You can also double-click the

appointment and check the 'Cancelled' button and save the appointment. Once the appointment is cancelled, a line will appear through the appointment.

To cancel more than one appointment at a time, select an appointment, and then hold down the Ctrl key on the keyboard while clicking more appointments. Finally, click the 'Cancel' button. The appointments you selected now have a line through them indicating that they are cancelled.

To un-cancel an appointment, select the appointment and uncheck the 'Cancelled' option.

Deleting Appointments

Deleting appointments is very similar to canceling appointments, except once deleted, the appointments are gone forever. To delete an appointment, select the appointment and click the 'Delete' button. To delete more than one appointment at a time, select an appointment, and then hold down the Ctrl key on the keyboard while clicking more appointments. Finally, click the 'Delete' button.

Searching for Appointments

If you need to find a particular appointment based on a client or description, the fastest way to find it is to search for it. The search will search for all appointments that match the criteria given the current view. For instance, if the user view is selected, the search will return all appointments for the current user only. If the 'Everyone' view is selected, it will return all appointments that match the criteria for all users in Prevail.

To search for an appointment, click the 'Search' button. Enter a keyword into the 'Search' field. The search is not case sensitive. Don't worry about getting capitalization correct. Select 'Client Name' to search for a client's last name, or select 'Description' to search for text in an appointment's description field. Choose a date range by typing in the dates, or using the drop down calendar control. Click the 'Search' button. The matching appointments will be shown in the appointments grid. Notice the grid is now purple and the 'Search' button now says 'RESET'. This is to inform you that you are in 'search mode'. Click the 'RESET' button to return to the normal view.

Printing Appointments

Sometimes it may be necessary to print a list of appointments for use during travel, or a long day out of the office. When printing, remember that the printing options pertain to the selected 'View'. For instance, if 'User' is selected, no matter what range you choose to print, it will only print the appointments for the current user.

Click the 'Print' button to view the 'Printing Options' window. In the 'Print Range' section, select the range of appointments you want to print. Choosing 'All' will print all of the appointments for the selected view. If the 'Everyone' view is selected, all appointments in the database will be printed. Choosing 'Today' will print those appointments due for the day selected in the calendar. The 'Date Range' option allows you to specify a range of dates to print. Once you select the 'Date Range' options, the 'Date Range' section below it will be enabled. Type in a date range, or click the down arrow to use the calendar control. Finally, the 'View' option allows you to print only those appointments that are currently shown in the appointments grid. Use the 'View' option if you want to print the results of a search. In the 'What to Print' section, check the box next to 'Description' to print the appointment's description. This is highly recommended for distinguishing between appointments. If you would like to print the detail for the appointment, check the 'Detail/Notes' option.
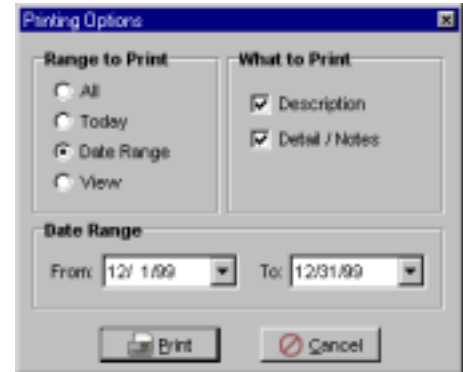
Click the 'Print' button to print the appointments, or click the 'Cancel' button if you decide not to print the appointments. Once you click the 'Print' button, the standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

To-Dos

Adding To-Dos

Adding a new to-do is similar to adding a new appointment. On the 'To-Do' tab, click the 'Add' button, or choose File→New To-Do from the menu. You can also add a To-Do from the main Prevail window by choose File→New To-Do. The 'To-Do Details' window will appear with a blank to-do. Choose the user who is to receive the to-do. For this example, choose your user name.

The 'Set Date' automatically defaults to the current date, if necessary to change it, do so by typing in the date, or clicking the down arrow to use the calendar control. Set the 'Due Date' in the same manner. The 'Type' is used to determine the kind of to-do. For instance, if the to-do were used to warn of an upcoming statute date, then the type would be 'SOL'. You can type in your own type, or choose one from the drop-down box. The 'Priority' is used for your convenience only. Select a priority from the drop-down box. If this to-do is associated with a case, you can check the 'Attach to Client' box and use the 'Change Client' button to set the client. Enter a description and detail if necessary. It is a good idea to add at least a short description for distinguishing between to-dos and search purposes. Click the 'Done' button to save the appointment.

Completing To-Dos

Completing a to-do allows you to keep a record of the task at hand, and when the task was completed. To complete a to-do, select the to-do and click the 'Complete' button.

To complete more than one to-do at a time, select a to-do, and then hold down the Ctrl key on the keyboard while clicking more to-dos. Finally, click the 'Complete' button. The to-dos you complete will disappear form the list. You can view the completed to-dos by checking the 'Completed' checkbox on the To-Do tab.

Deleting To-Dos

Deleting to-dos is very similar to canceling to-dos, except once deleted, the to-dos are gone forever. To delete a to-do, select the to-do and click the 'Delete' button. To delete more than one to-do at a time, select a to-do, and then hold down the Ctrl key on the keyboard while clicking more appointments. Finally, click the 'Delete' button.

Searching To-Dos

If you need to find a particular to-do based on a client or description, the fastest way to find it is to search for it. The search will search for all to-dos that match the criteria given the current view. For instance, if the user view is selected, the search will return all to-dos for the current user only. If the 'Everyone' view is selected, it will return all to-dos that match the criteria for all users in Prevail.

To search for a to-do, click the 'Search' button. Enter a keyword into the 'Search' field. The search is not case sensitive. Don't worry about getting capitalization correct. Select 'Client Name' to search for a client's last name, or select 'Description' to search for text in an to-do's description field.
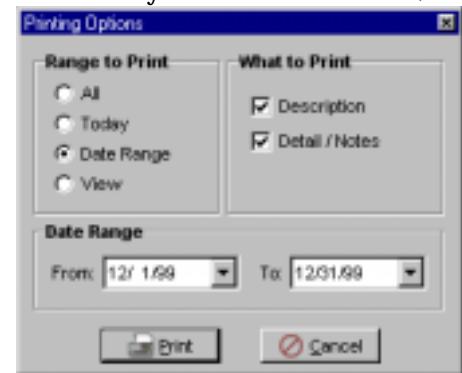
Choose a date range by typing in the dates, or using the drop down calendar control. Click the 'Search' button. The matching to-dos will be shown in the To-Do grid. Notice the grid is now purple and the 'Search' button now says 'RESET'. This is to inform you that you are in 'search mode'. Click the 'RESET' button to return to the normal view.

Printing To-Dos

Sometimes it may be necessary to print a list of to-dos. When printing, remember that the printing options pertain to the selected 'View'. For instance, if 'User' is selected, no matter what range you choose to print, it will only print the appointments for the current user.

Click the 'Print' button to view the 'Printing Options' window. In the 'Print Range' section, select the range of to-dos you want to print. Choosing 'All' will print all of the to-dos for the selected view. If the 'Everyone' view is selected, all to-dos in the database will be printed. Choosing 'Today' will print those to-dos due for the day selected in the calendar. The 'Date Range' option allows you to specify a range of dates to print. Once you select the 'Date Range' options, the 'Date Range' section below it will be enabled. Type in a date range, or click the down arrow to use the calendar control. Finally, the 'View' option allows you to print only those to-dos that are currently shown in the To-do grid. Use the 'View' option if you want to print the results of a search. In the 'What to Print' section, check the box next to 'Description' to print the to-do's description. This is highly recommended for distinguishing between to-dos. If you would like to print the detail for the to-do, check the 'Detail/Notes' option.

Click the 'Print' button to print the to-dos, or click the 'Cancel' button if you decide not to print the to-dos. Once you click the 'Print' button, the standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

Viewing To-Dos Due Today

When you check the 'Today' checkbox option on the To-Do tab, you can view only those to-dos that are due on the date currently selected in the calendar. This is great for weeding out current to-dos. Sometimes you may see a to-do, such as a Statute of Limitations warning that runs ten days from the due date. You won't always acknowledge that warning the first day it shows up on the to-do list. Therefore, your to-do list will not always remain totally blank all of the time. Viewing only those to-dos due during the current day will help reduce clutter and

time it takes to figure out exactly which tasks need to be completed. To return to the regular view, uncheck the 'Today' checkbox.

Viewing Completed To-Dos

There may be times when you will need to review old completed to-dos for archival purposes. To do so, check the 'Completed' checkbox. A list of completed to-dos will show with the 'Completed' column visible showing the date that the to-do was completed. When viewing completed to-dos, you are limited in what you can do with them. For instance, if you double-click a to-do, you will notice that all of the fields appear grayed-out. This is because you cannot edit a to-do once it has been completed. If you wish to delete completed to-dos, select them and click the 'Delete' button. This will remove them from the database forever. If you need to search for a completed to-do, click the 'Search' button and follow the same instructions for searching regular to-dos. To return to the regular to-do view, uncheck the 'Completed' checkbox.

Daily View

The 'Daily View' tab is used as a visual representation of your day's appointments in time blocks, such as each hour of the day, every thirty minutes of the day, or even every fifteen minutes of the day. When you click the 'Daily View' tab, the time blocks will be adjusted to show the current time of the day. For instance, if it's 1:30 PM, the daily view will adjust to show the period from 1:30 to whatever time fits in the grid. Any appointments scheduled that day will be blocked in gray with its short description. You can view an appointment by double-clicking the gray area.


If you want to add a new appointment, you can highlight the time frame (1:30 PM – 4:00 PM) by clicking the mouse button on the 1:30 PM row, dragging your mouse to the 4:00 PM row, letting go of the mouse button, then clicking the 'Add' button. Fill in the appointment information as described in the Appointments section.

If you would like to print the daily view, you can do so by clicking the 'Print' button. Once you click the 'Print' button, the standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.
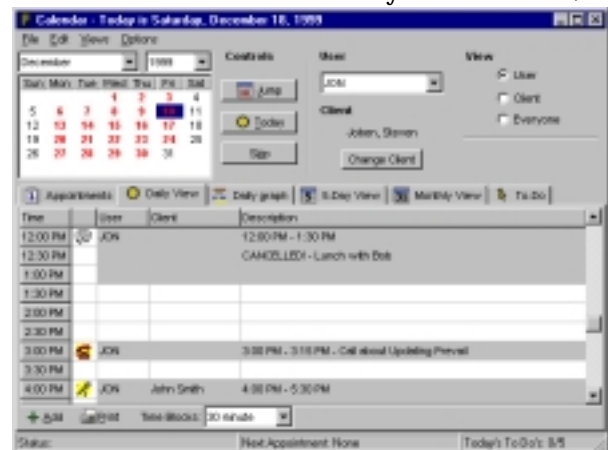
Daily Graph

The 'Daily Graph' view gives you a graphical representation of up to ten user's daily appointments. The graph uses a colored bar next to the user's name to represent an appointment. This view is useful to see when people have corresponding openings in their schedules for creating group meetings.
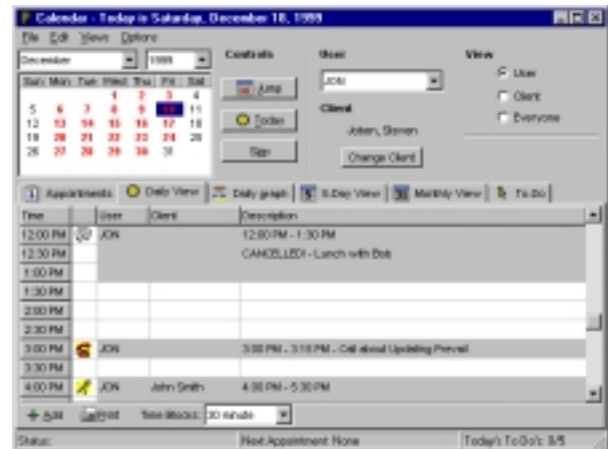
If you would like to print the graph, you can do so by clicking the 'Print' button. Once you click the 'Print' button, the standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

5-Day View

Selecting the '5-Day View' tab will allow you to preview five days of your appointments in the same view. Each appointment will appear with the scheduled time, the client (if attached), and the description of the appointment. If the current view is set to 'Client' or 'Everyone' the user's login will appear before the appointment's description. Double-clicking an appointment will take you to that day in the 'Appointments' tab.
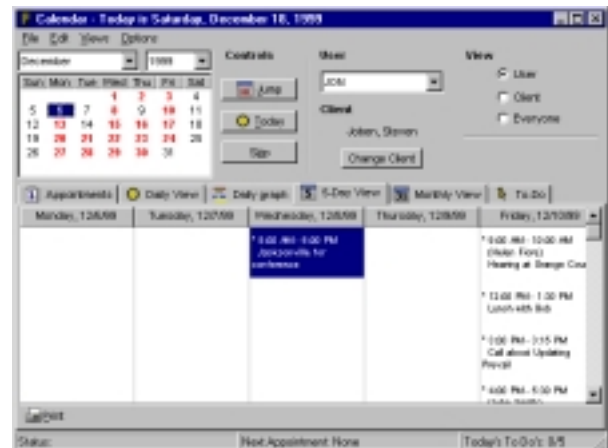
There are times when an appointment's description is too long to view in the grid. To make sense out of the view, you can right-click on an appointment. An 'Events' window will appear with the day name, date, time range, client (if attached), and the full description of the appointment. Click

anywhere on the 'Events' window to close it, or click the X in the upper right hand corner.

If you would like to print the view, you can do so by clicking the 'Print' button. Once you click the 'Print' button, the standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

Monthly View

The 'Monthly View' shows the currently selected month in a calendar format. Days that have appointments associated with them will have a brief description of the appointment in the day's box. Double-clicking on a day will take you to the 'Appointments' tab for that day. Since there is limited space for each day, not all appointments will be visible for a particular day. To view all of the appointments for a day, right-click on a day. An 'Events' window will appear with the full date and a list of all appointments. If the current view is set to 'Client' or 'Everyone' the user's login will appear before the appointment's description. Click anywhere on the 'Events' window to close it, or click the X in the upper right hand corner.

If you would like to print the view, you can do so by clicking the 'Print' button. Once you click the 'Print' button, the standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

Calendar Options

The Calendar allows for some customization. Choose Options→Calendar Options. Under 'Appointment Types', you can give descriptive names to the different types of appointments, and change the icon

for each type. The 'Default Views' section lets you change what view is the default view when the Calendar opens. Change the 'Default Time Blocks' to whatever size block you would like to use when scheduling appointments and to-dos, and viewing the 'Daily View'. Click the 'Done' button to save your changes.

Documents

Save time and increase productivity by utilizing Prevail's document features

O ne of Prevail's time saving features is its document creation and management. Prevail speeds up the document process by doing the data entry work for you. All that is necessary on your part is selecting the letter or form to merge. With as little as three mouse clicks, you will be merging documents, saving time, and being more productive than ever before.

Prevail is compatible with Microsoft Word '95-2000, and Corel WordPerfect Suite 7 – 9 (2000). Before you can start merging documents, one of these word processors must be installed on the machine that is running Prevail. This chapter will help guide you through creating new forms and letters, merging documents, with clients, and modifying existing forms and letters.

Creating New Documents

The process described below tells you how to create document templates to use with Prevail. You follow this process one time for each document template you want to create. Once a template is created it can be used over and over to create documents (complete with merged client data) in any of your cases. To merge documents from templates that have already been created, simply press F5 or click the 'Forms' button. If that is all you are trying to do, read no further in this section. This section is intended solely for the power users. If you just want to know how to merge letters in your cases, skip ahead (past all this scary stuff) to the section called "Merging Letters".

Creating documents is a two-step process. The first step to creating a merge document is to actually create the document template in the word processor. Before we begin, make sure you have printed the field code lists by choosing Options→Print Field Code List and Options→Print Prospect Field Code List. These lists contain field code numbers and a brief description of the field so you can successfully merge information from Prevail into the word processor.

Creating a Prevail Template

If you are using Microsoft Word, we can create a Prevail document template to simplify the process. That way, you can choose File→New from the menu in Microsoft Word, select the Prevail template, and immediately start creating documents without opening a document that already exists and editing it.

If Microsoft Word is not running, go ahead and open it. Choose File→Open from the menu, and open the document X:\Prevail\Docs\Word\0000, where X is the mapped server drive. If you cannot find the file, make sure you are looking at all files, not just .doc files. Once the file is open, select all of the text in the document, and delete the text. Next, choose File→Save As from the menu, type 'Prevail Document' as the file name, change the 'Save as type' drop-down box to 'Document Template (*.dot)', click the 'Save' button, and close the document. The next time you choose File→New in Microsoft Word, you will see an item under the 'General' tab called 'Prevail Document'. You can then select it to create a new Prevail document.

Create a New Document

Microsoft Word

If you are using Microsoft Word, choose File→New from the Word menu, and double click the 'Prevail Document' icon. If you do not see a 'Prevail Document' icon, follow the steps in the previous section titled 'Creating a Prevail Document Template'. This will give you a clean document and the merge toolbar with the buttons 'Insert Merge Field' and 'Insert Word Field'. Next, before you can start manipulating field codes, you need to be able to see the field codes. Choose Tools→Options from the Word menu. On the 'View' tab, check the 'Field codes' option. Click the 'OK' button to save the changes.

Prevail has over 500 merge-able fields of data for each client. Every one of those fields has a number associated with it. You instruct the system to insert data from a client record into a document by inserting the field code number for that piece of information into the document.

Go ahead and start composing the letter or form like you normally compose a document in Word, including any font changes, formatting, alignment, etc. When you get to a place in the document that requires client information, place your cursor where the information should go, and click the 'Insert Merge Field' button. A drop-down menu will appear with a lot of items called F1-F530. Look at the field code list you printed earlier, find the information you want to enter, and choose the item from the list. For instance, if you wanted to choose the client's first name, you would click 'F2' from the drop-down menu. If you need to enter a field code that is a large number, instead of scrolling through the entire list, simply choose any item, such as F1, and change the number to the corresponding field code number. When you add a merge field to the document, it will appear as:

```
{ MERGEFIELD F1 }
```

You can continue in this fashion, moving the cursor to each spot in your document where you want to insert a field code, clicking the 'Insert Merge Field' button, and clicking the field number. Remember to insert field codes in exactly the same place in the document as you would insert the actual data. For example, if your document started out looking like this:

```
(salutation) (first name) (middle name) (last name)
(address)
(city), (state) (zip)

Dear (salutation) (lastname):
```

You would replace the information in parentheses with the corresponding field codes as follows:

```
{MERGEFIELD F1} {MERGEFIELD F2} {MERGEFIELD F3} {MERGEFIELD F4}
{MERGEFIELD F5}
{MERGEFIELD F6}
{MERGEFIELD F7}, {MERGEFIELD F8} {MERGEFIELD F9}

Dear: {MERGEFIELD F1} {MERGEFIELD F3}:
```

With these codes inserted in this fashion, every time you merged this letter in Prevail it would automatically insert the appropriate information from the currently selected client into the finished document. We just used a few field codes here for purposes of illustration -- make sure you read over the entire field code list to get a feel for the many fields of information that are available to be merged. Also, do not worry if the text of the actual code wraps to the next line. Generally, in actual documents, the text itself is much smaller than the codes.

There are some things in your document that may be variable from one client to another, but for which no field codes exist. In these instances you can use the "Fill-in" command from the 'Insert Word Field' button menu. This way, when the end-user is merging the document they will be prompted to enter the appropriate information directly from the keyboard while the document is merging. For example, if your letter tells the client about a scheduled appointment and you want to include the date and time in the text of the letter, you can insert a Fill-in command into your form letter. This would pause the merge and prompt the user to enter the date and time of the appointment before continuing. In the text of the form letter, the Fill-in code would look like this:

```
Your appointment has been scheduled for {FILLIN "Enter appointment date and
time:"}.
```

However, when merging this document, a box would pop up prompting the user to 'Enter appointment date and time.'

There are also instances where you might not always want to include a merge field. For example, if an address has 2 lines (i.e. a second line for a suite number) you would want to insert the field code for the second line of the address. However, not every address has a second line. If an address does not have a second line and you insert a field code for the second line, Word will automatically eliminate the blank lines in your finished documents.

Once you have finished composing the document, save it to your 'My Documents' folder, or save it to the X:\Prevail\Docs\Word directory, where X is the mapped server drive.

Corel WordPerfect

Open WordPerfect and create a new document by choosing File→New from the menu. Before you can use any document as a merge document in WordPerfect, you have to let WordPerfect know that this document is going to be a form letter. Choose Tools→Merge from that WordPerfect menu. You will then be asked if you want to create a data file or a form file. Click on the 'Form' button. This lets WordPerfect know that you want to create a form letter. Another prompt will ask if you want to create a new file or use the file in the active window (the document you are currently looking at). Choose 'File in Active Window' and the currently active document will be set up as a form file. Next, you will be asked to associate a data file with the current form file. Prevail doesn't need or want a data file to be associated, so choose "None". The merge toolbar will be displayed across the top of your document. You are now ready to begin putting in composing the document.

Go ahead and start composing the letter or form like you normally compose a document in WordPerfect, including any font changes, formatting, alignment, etc. When you get to a place in the document that requires client information, place your cursor where the information should go, and click the 'Insert Field' button. The first time you do this, a message may appear that says, "No records or field names were found." This is ok since it does not hurt anything. Click 'OK' to close the message. Next, a box will appear that allows you to type in the field number you want to insert into your document. Refer to your field code list to find the right number, then click the cursor in the 'Field' window and type the number. When you are done, click the 'Insert' button to the right of the field window. This will insert the field into your document. When you add a merge field to the document, it will appear as:

```
Field(1)
```

You can continue in this fashion, moving the cursor to each spot in your document where you want to insert a field code, typing in the desired field number, and clicking the 'Insert' button. If you accidentally close the 'Insert Field' window, you can open it again by clicking the 'Insert Field' button on the left side of your toolbar. Remember to insert field codes in exactly the same place in the document as you would insert the actual data. For example, if your document started out looking like this:

```
(salutation) (first name) (middle name) (last name)
(address)
(city), (state) (zip)

Dear (salutation) (lastname):
```

You would replace the information in parentheses with the corresponding field codes as follows:

```
Field(1) Field(2) Field(3) Field(4)
Field(5)
Field(6)
Field(7), Field(8) Field(9)


Dear: Field(1) Field(3):
```

With these codes inserted in this fashion, every time you merged this letter in Prevail it would automatically insert the appropriate information from the currently selected client into the finished document. We just used a few field codes here for purposes of illustration -- make sure you read over the entire field code list to get a feel for the many fields of information that are available to be merged.

There are some things in your document which may be variable from one client to another, but for which no field codes exist. In these instances you can use the 'Keyboard' command on the merge button bar to insert a prompt into your document. This way, when the end-user is merging the document they will be prompted to enter the appropriate information directly from the keyboard while the document is merging. For example, if your letter tells the client about a scheduled appointment and you want to include the date and time in the text of the letter, you can insert a keyboard command into your form letter. This would pause the merge and prompt the user to enter the date and time of the appointment before continuing. In the text of the form letter, the keyboard code would look like this:

```
Your appointment has been scheduled for KEYBOARD(Enter Date and Time).
```

However, when merging this document, a box would pop up prompting the user to "Enter Date and Time."

There are also instances where you might not always want to include a merge field. For example, if an address has two lines (i.e. a second line for a suite number) you would want to insert the field code for the second line of the address. However, not every address has a second line. If an address doesn't have a second line and you insert a field code for the second line, you would be left with a blank line in your finished document. WordPerfect has a very simple way to fix this. Simply insert a question mark directly after the field number. This will instruct WordPerfect to eliminate the line entirely if the field is blank, thus eliminating blank lines in your finished documents. The codes in your form letter would then look like this:

```
Field(1) Field(2) Field(3) Field(4)
Field(5)
Field(6?)
Field(7), Field(8) Field(9)
Dear: Field(1) Field(3):
```

Notice the question mark inside the parentheses on 'Field(6?)'. If that field contains data, then it will be inserted in the appropriate spot when the document is merged. If it is blank, the line will be eliminated in the finished document.

Once you have finished composing the document, save it to your 'My Files' folder, or save it to the X:\Prevail\Docs directory, where X is the mapped server drive.

Adding the Document to Prevail

After you've created the document, you have to add it to Prevail to make it available as a merge document. Click the 'Forms' button. On the 'Document List' window, click the 'Add' button. The 'Document Setup' program will appear allowing you to enter the document's description. In the 'Description' field, enter a brief explanation of the document. The 'Group' is used for grouping documents together to make finding the document in the list easier. There are no standard groups, so this field is another decision your firm will have to make. Prevail comes with a few letters already. You can use those group names, or create new ones.

The 'Law Type' field is used to determine which law type will use the document. If you do not want to limit the document's usage to a particular law type, then leave this field blank. If the document is for a social security case, then select 'SS' from

the drop-down list. If the document is used for a prospect, then select 'PR' from the list. Other types available are PI (Personal Injury), MM (Medical Malpractice), and WC (Worker's Compensation).

The 'Level' field is used primarily for social security cases. Entering a claim level code in this field will automatically trigger Prevail to update the claim status on the Claims tab to this level. For instance, if you are merging a Request for Hearing and the document's level is set to 'HEAR1', when you merge this document a status entry will be made on the Claims tab that says 'Request for Hearing Sent' on today's date.

The 'File Name' field should contain the exact physical file name of the document. You can click the folder icon button next to the field to use the Windows open dialog to browse for the file. Using this method will assure that the file name is correct. After you find the file and click the 'Open' button on the Windows open dialog, you will be asked if you want to copy the file to the Prevail documents directory. If the file does not already exist in the X:\Prevail\Docs or X:\Prevail\Docs\Word directory, then click the 'Yes' button to copy the file automatically.

If you want Prevail to add a time entry to the Time tab when you merge the document, enter the time in hours (15 minutes is 0.25). If the value is greater than zero, Prevail will automatically create the time entry.

The 'Postage' field allows you to track the costs of sending documents in a case. If the value of the 'Postage' field is greater than zero, a cost entry will be created on the Costs tab. No entry will be created if the field is left blank or the value is zero.

If merging this document should post a reminder to the to-do list, then enter the number of days to post the reminder after the date it is merged. You should always make the response day at least a couple days less than the actual response days you need. This way, the warning will appear in your to-do list a few days before it's actually due for a response, giving you time to prepare if necessary. You can set the exact text that will appear on the to-do by setting the 'Reminder Text' field.

If the document requires special information, such as a defendant's information or insurance information, then check the option necessary for the document. When you merge the document, you will be prompted to select the appropriate defendant, employer, medical provider, or related party.

Click the 'Done' button to save the document's entry, or click the 'Cancel' button to discard the new entry. If you need to make any modifications to a document, click the 'Edit this Document' button to open the document in your word processor.

Merging Letters

To merge a letter with the currently selected client, click the 'Forms' button. The 'Merge Type' defaults to 'Letter'. Select the letter you wish to merge and click the 'OK' button. You can search for the document's group by entering the group in the 'Search' field, and pressing Enter on the keyboard.

After you selected the document, the 'History Item' window will appear allowing you to modify the information about the document that is about to be merged. The history item information will appear in the Document History after it has been merged. Most of the information in the window is automatically entered. The only field that is not entered is the 'Detail' field. You can modify any of the information in this window. The 'File Name' field does not need to be modified if you are merging a document. This field is more for entering incoming documents or documents that aren't created by a Prevail merge.

The 'Merge across query' option allows you to merge the same document for all of the clients in the current query. If a query is not set, it will merge for all active clients. Once you check the 'Merge across query' checkbox, another checkbox called 'Create batch document (1 file)' appears. Checking this option will force Prevail to create one large document for all of the clients, opposed to one document for each client. If you are using WordPerfect and there are more than eight clients in the current query, Prevail will automatically check the batch file option because WordPerfect can only have eight documents opened at the same time. When merging a document across a query, Prevail will create all necessary document history and time entries for each client in the query.

If necessary, make the appropriate changes and click the 'Done' button to begin the merge, or click the 'Cancel' button to stop the merge. Your word processor will open and merge the file with the current client's information. If the document needs additional information such as a medical provider, defendant, related party, or employer information, you will be prompted to select the appropriate information for the merge. If you are merging a letter with a personal injury case and there are more than one hearing entries, Prevail will automatically prompt you to select the hearing and judge information regardless of whether the letter uses the information.

Merging Forms
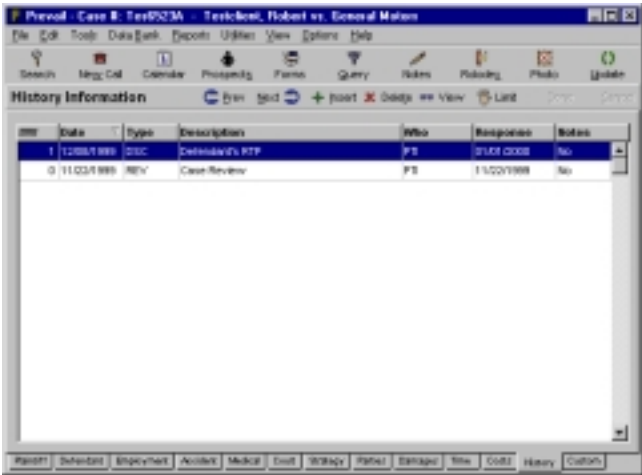
To merge a form with the current client, click the 'Forms' button. Select 'Form' as the 'Merge Type'. If you are merging an SSA form, be sure to select the claim

number from the Claims tab before clicking the 'Forms' button. Select the form you wish to merge. The 'Merge across query' option acts the same as they do for merging a letter. Read the section above for information on these options. Click the 'OK' button to begin the merge. The document information is automatically added to the Document History.

Document History

In addition to creating form letters and SSA forms, Prevail also keeps track of them. When you generate a letter or an SSA form, it is automatically saved and a record of that document is made in the document history for the currently selected case.

This history includes a description of every document sent (or received) for this case. Each line in this summary represents an individual document. The entry for each document includes the date of the document, who generated it, a narrative description of the document, when a response to the document is expected, and whether there is detail (additional notes) on the document.

If there are notes on a document and you want to view them, you can simply double-click on the document's listing in the summary. This will bring up a more detailed view of the document that includes the case manager (the person who will receive the follow-up reminder for this document on his/her to-do list), notes, time charged for the document (Prevail can automatically bill the file every time a specific document is created), and even the physical file name of the document. When you are finished viewing the entry, click on the 'Done' button at the bottom of this window.

Since Prevail automatically saves all of your documents, it also knows where to find them if you want to retrieve them later. To retrieve any document listed in the history summary, select the document and then click the 'View' button on the navigation bar. Prevail will automatically open the word processor and retrieve the document. When you are done viewing the document, you can either minimize or close your word processor, and switch back to Prevail. If you want, you can leave both Prevail and your word processor running at all times.

If you want to quickly search through your document history entries to find a specific document or group of documents, you can use the 'Limit' feature by clicking the 'Limit' button. This will show the 'Text Search' window. Enter a keyword or text string (i.e. the word you want to search for), and specify which field you want to search in for that word. After you have entered a search string and clicked on the 'OK' button, Prevail will limit the display of documents so that only those documents that match your search criteria are displayed. Notice that the grid turns purple and the 'Limit' button now says 'RESET'. This is too let you know that you are in 'limit mode'. When you are finished with your search, click on the 'RESET' button and the view will return to normal.

When generating documents, Prevail automatically creates the history entries for you. You can also manually insert documents into history. This is normally done if you want to track incoming as well as outgoing documents. To manually insert a document into history, click on the 'Insert' button at the top of the screen. An entry window will appear that lets you enter information on the new document (e.g. description, date, etc.). There are pull-down arrows on the 'Code' and 'Description' fields to speed data entry. The code is simply a 3-letter category that lets you designate documents by type. The description is a one-line explanation of what the document is. Note that there is also a detail field which gives you space to enter a brief description of the document. Below the 'Detail' is a field called 'File Name'. If your firm scans incoming documents for archival purposes, you can link the scanned document to this entry by clicking the 'Choose' button, locating the file, then opening it. When

you select this entry in the document history from now on, you can click the 'View' button to open it in the related application. Click the 'Done' button to save the entry.

Notice that there is also a 'Delete' button next to the 'Insert' button. You can use this button to delete any history entries that were made in error.

If you enter all of your incoming documents into history, you can easily glance at the screen to see what has gone out and what has come in. You can also use the 'Limit' feature described earlier in this section to limit the display to documents of a particular type (e.g. doing a search for "RCV" in the "type" field would show only incoming or received documents). You can also sort each column by clicking on the title of the column. An arrow will appear pointing up or down, depending on whether the sort is ascending or descending.

Chapter

9

New Calls and Prospects

New calls and prospects

P revail differs from most other case management packages in that it allows a two-staged approach to client data entry. In most case management packages, a client is entered into the system when they are accepted as a client. They are then assigned a client number and go straight into your client table. Prevail differs from that approach in that it has a 'Prospects' section.

Prevail prospects are prospective clients that you have spoken to and gathered information from, but who are not yet clients. You can add and edit information on prospects as often as you like. You can even use Prevail to automatically generate letters and forms to those prospects like you would with a real client. Prevail can automatically send a fire letter to a client whose case you are not going to take, or send an appointment confirmation letter to someone who you are bringing in to sign up. Any of the information you gather on a prospect can be merged into these letters automatically. You can even set up packages of documents that will merge several letters and forms to a prospective client (e.g. thank you letter, representation agreement, etc.).

If you sign up a prospect, you can instantly transfer all information you have gathered about that prospect (including all notes and generated documents) into your main client table with a single click of the mouse.

Entering a New Call

When you receive a phone call or walk-in visit from a person wishing to obtain legal services, you can add them to the prospects list by clicking the 'New Call' button on the Prevail toolbar, choosing File→New Client, or pressing the F10 key on your keyboard. Note that you can access this screen from any page in any client, and it will pop up right on top of whatever page you happen to be working on at the moment.

Client Information

The first page you will see when adding a prospect is the 'Client Information' page. This page is used to gather personal information from the prospect such as name, date of birth, address, social security number, language, and phone numbers. This is also where you specify the law type of the prospect. While a brand new call will not immediately have a case manager or attorney, these fields are there to fill in at a later time when more information is learned about the prospective case.

The prospect can be saved at any time by clicking the 'Done' button. So, if you happen to get another call, you can save the prospect and come back to him at a later time. Click the 'Continue' button if you would like to continue gathering information from the prospect.

> **Important!**
>
> You must specify a law type on the 'Client Information' page of the new prospect, otherwise the system will not know what type of data entry screen to give you for the second page.

SS Information

The first page of the 'New Prospect' window is always the same, no matter what law type you select. The second page, however, changes depending on the law type you specify. If the law type specified is 'SS' for Social Security, the second page you will see is the 'SS Information' page. Here, you can enter basic information regarding the prospect's case such as onset date, previous claims, employment status, incomes, and scheduled appointments.

If you would like to schedule an appointment for an interview with the prospect, click the alarm icon next to the 'Appointment Date' field. This will open the new appointment window. Notice that the 'Attach to Client' checkbox is checked and

the name of the prospect appears grayed-out. This is because you are adding an appointment for a person that is not yet a client. Fill in the information about the appointment and click the 'Done' button to schedule the appointment.

Click the 'Continue' or 'Done' button to save the prospect.

Liability Information

If the law type of the prospect is set to anything other than 'SS', the new call is treated the same. Although the actual data for each case differs to some degree, for the different law types, PI (personal injury), WC (worker's compensation) and MM (medical malpractice), the basic information you input when taking an inquiry is sufficiently similar that you do not need different input pages for each law type. Information that can be entered on this page is an accident date, case type, one defendant, and appointment.

If you would like to schedule an appointment for an interview with the prospect, click the alarm icon next to the 'Appointment Date' field. This will open the new appointment window. Notice that the 'Attach to Client' checkbox is checked and the name of the prospect appears grayed-out. This is because you are adding an appointment for a person that is not yet a client. Fill in the information about the appointment and click the 'Done' button to schedule the appointment.

Click the 'Continue' or 'Done' button to save the prospect.

Notes and Prospect Questionnaires

The 'Notes' tab allows you to enter an unlimited amount of text for the prospective case. Prevail also uses the Notes tab for prospect questionnaires. The prospect questionnaires are completely customizable. You can enable the prospect questionnaires and customize them by choosing Options→Properties from Prevail's main menu. The type of questionnaire used for a prospect depends on the law type. When you activate the prospect, the Notes are moved into Case Notes.

Document History

The 'Document History' tab is available for all prospects, regardless of law type. The 'Document History' is very similar to the 'History' tab in Prevail. This history includes a description of every document sent (or received) for this prospect. Each line in this summary represents an individual document. The entry for each document includes the date of the document, who generated it, a narrative description of the document, when a response to the document is expected, and whether there is detail (additional notes) on the document.
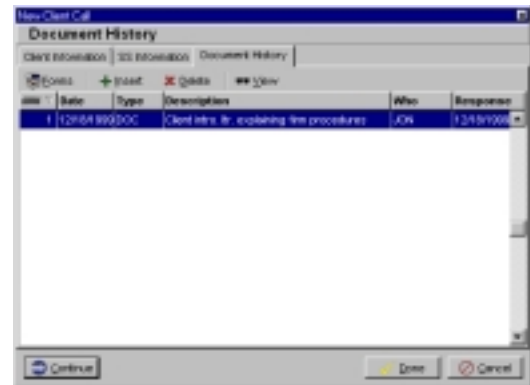
Since Prevail automatically saves all of your documents, it also knows where to find them if you want to retrieve them later. To retrieve any document listed in the history summary, select the document and then click the 'View' button. Prevail will automatically open the word processor and retrieve the document. When you are done viewing the document, you can either minimize or close your word processor, and switch back to Prevail.

Click the 'Done' button to close the 'New Prospect' window.

Viewing Prospects

To view all new calls, click the 'Prospects' button on the Prevail toolbar, choose Tools→Open Prospects, or press the Ctrl+F10 keys on your keyboard. The prospective clients are listed by last name in alphabetical order by default. If you would like to sort the information according to a different column, just click the title of the desired column. For example, if you want to sort the information according to the onset date, click 'Onset' at the top of the column. The prospects will be sorted according to the onset date in ascending order. Clicking 'Onset' again will switch the sort to descending order.

The buttons across the top of the window allow you to perform the various functions available to your Prospects data. Some of these functions are also available in the main Prevail window, while others you will only see in the 'Open Prospects' window. To close the 'Open Prospects' window, click the 'Done' button or the X in the upper right hand corner.

Adding a Prospect

To add a new call from the 'Open Prospects' window, click the 'New Call' button. For information on adding a new call, please see the previous section titled 'Entering a New Call'.

Editing a Prospect

If you need to change a prospect's information, double-click the prospect, or select the prospect and click the 'Edit' button. The 'New Prospect' window will appear. Change the desired information and click the 'Done' button to save the changes. If you do not want to save the changes you have made, click the 'Cancel' button.

Deleting a Prospect

Deleting a prospect is generally not advised, unless you have made a mistake on a prospect and would like to add the information again. When you delete a prospect, the prospect is deleted forever with no way to retrieve it. To delete a prospect, select the prospect and click the 'Delete' button. You will be asked to confirm the deletion. Click the 'Yes' button to delete the prospect permanently, or click the 'No' button to keep the prospect.

It is recommended to use 'Close' rather than deleting a prospect. Please see the section below titled 'Closing a Prospect'.

Merging Forms and Letters

A new feature to Prevail 3.9 is the ability to merge documents with prospects. As you learned above, prospects have their own document history like a regular client.

To merge a document with a prospect, select the prospect and click the 'Forms' button on the 'Open Prospects' window. If you are viewing a prospect's information, you can merge a document by clicking on the 'Document History' tab, and clicking the 'Forms' button. Using both methods, when you click the 'Forms' button, a drop-down menu will appear. Select either 'Letters' or 'Forms' depending on which type of document you want to merge. If merging a form, select the form and click the 'OK' button to start the merge. If merging a letter, select the letter, click the 'OK' button, fill in the document's information, and click the 'Done' button.

Since the prospects table and the regular client table differ in the number and types of fields they have, it may be necessary to create a separate set of forms for use with prospects. As far as field codes are concerned, the prospects field codes are matched as best as possible to its regular client counterpart. For instance, the basic client information such as first name, last name, middle name, salutation, street address one, street address two, city, state, zip code, etc. are the same as the prospect's basic information. So if your letter does not contain information for specific law types, the forms can be used for both clients and prospects. For a complete field code list for prospects, choose Options→Print Prospect Field Code List from the main Prevail menu. Use these field codes when creating merge documents to be used for your prospects.

Printing
When you click the 'Print' button on the 'Open Prospects' window, a drop-down menu will appear giving you two options.

Printing the Prospects List
The first item in the 'Print' drop-down menu is 'List'. Choosing 'List' will print out a columnar report with every prospect in Prevail. The list will include information such as the prospect's name, social security number, phone number, law type, and onset date.

When you choose the 'List' option, a standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

Printing a Prospect
The second item in the 'Print' drop-down menu is 'Prospect'. Choosing 'Prospect' will print the selected prospect's information. The information printed includes all of the information available on the 'New Prospect' window.

When you choose the 'List' option, a standard Windows print dialog will appear. If you need to select or setup a printer, do so at this window, then click the 'OK' button to print.

Reviewing a Prospect
When you review a prospect to become a potential client, Prevail keeps track of when you last reviewed the client, and the number of times you have reviewed the prospect. A review basically consists of looking at the prospect's information.

To review a prospect, select the prospect and click the 'Review' button. The 'New Prospect' window will appear with the prospect's information. Click the 'Continue' button to view the second page of information. When you have finished reviewing the prospect, click the 'Done' button at any time, or click the

'Continue' button from the second page. When the 'New Prospect' window closes, notice that the 'Tries' and 'Last Try' column is updated for that prospect.

Searching Prospects

To search for a prospect, click the 'Search' button on the 'Open Prospects' window. The prospect name Power Search window will appear. Search for a prospect's first or last name and click the 'Search' button. To view a prospect, double-click the prospect.

Activating a Prospect

Activating a prospect simply means that you are accepting this prospect as a client. When activating a prospect, the prospect's information is copied over to the client table making it an open case. The prospect is then removed from the prospects list.

To activate a prospect, choose one from the list and click the 'Activate' button. Prevail will ask you to confirm your decision. Click 'Yes' to continue to activate the prospect, or choose 'No' to cancel. After confirming to activate the prospect, Prevail will ask for a case number. The case number automatically defaults to Prevail's internal client ID number. The default case number consists of the first three letters of the person's last name, the last four digits of their social security number, and a letter between A and Z. Prevail will use A if this is the first case this person has in the system. For each subsequent case that person has, the letter will be incremented. You may use this numbering system if you would like, or you may use your pre-existing numbering system instead. Enter your desired case number and click the 'OK' button. Once you click OK, Prevail will check for any conflicts that may occur (prospect you are activating is a defendant in another case, etc.). At this point, the prospect is now a client. If conflicts exist, review them then decide whether to keep the client. If you decide not to keep the client, you can close the case. It is always a good idea to enter something in the case notes saying that the case was closed because of a conflict of interest.

Once the prospect becomes a client, the 'Open Prospects' window will close and the new client will be the current case.

Closing a Prospect

Closing a prospect means you are denying the person legal services. The difference between deleting a prospect and closing a prospect is that closing a prospect will keep a record of the prospect in the closed prospects table, and deleting a prospect completely removes it from Prevail without record. It is best to close a prospect to remove someone from your prospects. That way, if they return later on to become your client, you can reopen their record without having to reenter information.

To close a prospect, select the prospect and click the 'Close' button. You will be asked to confirm your action. Click the 'Yes' button to close, or click the 'No' button to cancel. Once closed, you can view the closed prospects by choosing Tools→Closed Prospects, or pressing Shift+F10 on the keyboard.

Viewing Closed Prospects

Prevail now allows you to close prospects like you would normally close a case. To view the closed prospects, choose Tools→Closed Prospects from the Prevail main menu, or press Shift-F10 on the keyboard. The 'Closed Prospects' window looks almost identical to the 'Open Prospects' window with the exception of a few missing

buttons and the added column 'Closed Date'. All of the buttons in the 'Closed Prospects' window do the exact same thing as their counterpart in the 'Open Prospects' window. The only button that differs is the 'Re-open' button.
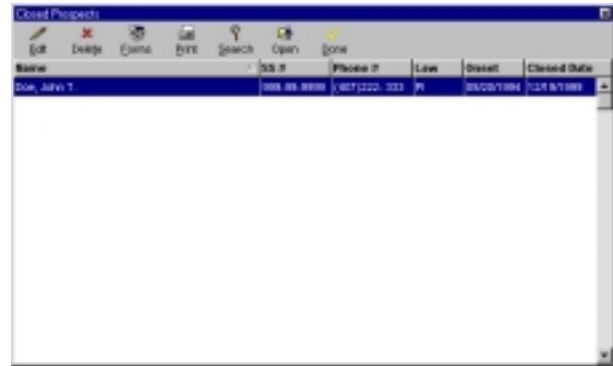
Re-opening a Prospect

Once a prospect is closed, you can re-open it at a later time. To re-open a prospect, select the closed prospect and click the 'Re-open' button. The prospect will be removed from the closed prospects list and re-added to the open prospects list.

Searching

Searching

P revail 3.9 provides more searching capabilities than any previous version of Prevail. Not only can you search by a client's name, you can also search by an opposing counsel related to a case, a referral source, a medical provider and much more. If you have knowledge of SQL, you can even create your own custom searches.

Quick Search

When you click the 'Search' button on the main Prevail window, hit the 'F2' key on the keyboard, or choose Tools→Search from the main menu, the Quick Search window will appear. Quick Search is equivalent to the client name search of previous versions of Prevail. To search for a client's last name, type the beginning of the last name or the full last name, and click the 'Search' button. To choose the client, double click the client's name, or select the client and hit the 'Enter' key. The case will be opened in Prevail. To close the search window without choosing a client, click the X in the upper right hand corner, or hit the 'Esc' key on your keyboard.
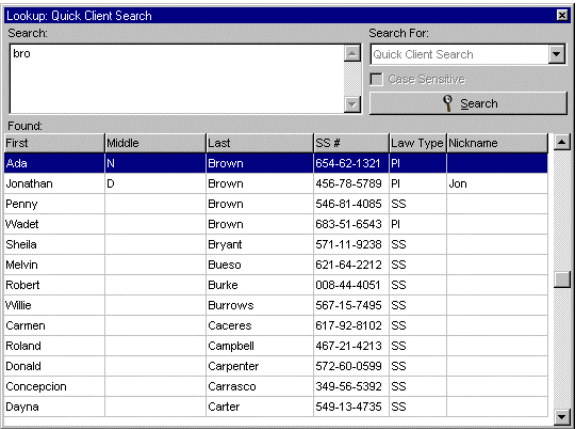
Power Search

The Power Search feature gives you a lot more control over the search. Using the Power Search, you can search for any information in any of the tables in Prevail.

The Power Search window looks exactly like the Quick Search window with three exceptions -- the 'Search For' drop down box is enabled, the 'Case Sensitive' option is enabled, and the 'Found' grid defaults to blank. To open the Power Search, choose Tools→Power Search or type Ctrl+F2.

Select a search type by choosing an item from the 'Search For' drop down box. Type the text you wish to search for in the 'Search' box. If you want to perform a case sensitive search, meaning match exact capitalization, check the 'Case Sensitive' option. Click the 'Search' button to begin the search.
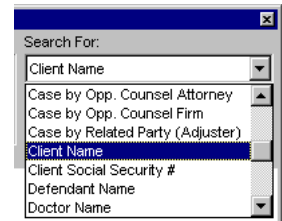
The amount of time it takes to complete a search depends on the nature of the search. The search types that begin with 'Cases by' typically take longer to complete because of the very nature of the search. If a lot of joins and relationships across tables are part of the search, it will affect the overall speed of the search. Most of the search types that come with Prevail use pertinent criteria for the search, such as a person's first, middle, or last name, a company name, or sometimes zip codes.
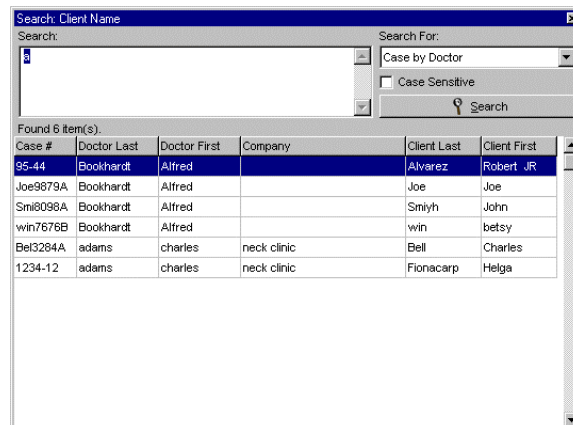
If you are searching a client's information, or a 'Case by' type, double clicking the client's name, or selecting the client and hitting the 'Enter' key on the keyboard will select this client in Prevail. Other types of searches will show the detail of that particular item. For instance, choose 'Doctor' from the 'Search For' drop down box and search for a doctor. If you double-click one of the doctors, the doctor's information will appear. You can edit this information if you wish. Click the 'Done' button on the 'Medical Provider Detail' window to close and save changes, or click the 'Cancel' button or hit the 'Esc' key to close the window.

SQL Statement

There is a special item in the 'Search For' drop down box called 'SQL Statement'. This option allows you to type in your own search in SQL format. The example to the right is displaying all clients that have a last name that begins with a letter before 'M' and sorts the results by last name, first name, then middle name. The 'SQL Statement' search type is great for debugging searches, debugging data, and even quick calculations. For information on SQL, see the Reference chapter.
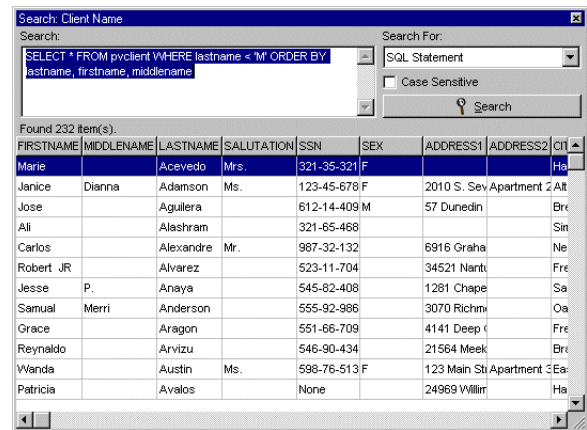
Saving Custom Searches

One draw back of the SQL Statement feature is the inability to save the search for later use. Though most users will be satisfied with the default searches provided, there may be an instance where a particular search you need may not be in the system. For these special cases we have provided an external database program called ARC32 that is used to manipulate databases at the table level with minimum interface. Future versions of Prevail will have the capability to create and save searches without having the manually do it. Only experienced database users should perform this task. Please read the warning below before continuing.

> ### Warning!
>
> Data corruption and severe data loss may result from attempting to perform operations on the database without consent from Practice Technology, Inc. If you choose to use an external program to view the Prevail database, any loss of data that might occur is at your own risk. Practice Technology, Inc. reserves to right to refuse service to those that have attempted to use an unwarranted piece of software or operation on the Prevail databases.

If you do not have the ARC32 program installed, see the Prevail CD for information on installing it. If it is installed, run the application. Choose File→Open Table from the main menu. Open a file called 'pvsearch.adt' found in your network Prevail directory. Look at the data in the file before attempting to

create a new record. Click the insert record button (a plus found under the grid) to insert a blank record. See the following table for a description of each field.

Field	Description
SQL	The SQL field determines whether or not the search uses the SQL language.
Table	The table value is used to determine what table should be used if the search does not use SQL. Tables are named by replacing the 'pv' with a 't' of a table name. For instance, the file pvclient.adt table name would tclient.
Source	The source value is the name of the database file without the extension that should be used if the search does not use SQL.
Type	The type of search determines how Prevail will react to double-clicking or selecting a result from a search. The types are pre-defined by Prevail. Use only a type that already exists. If the type is 'Client', double-clicking the result will open the case. Any other type will show the detail for that particular item.
Name	The name is the description of the search that will appear in the 'Search For' drop-down box. Be careful that you choose unique names for searches.
NonCase	The noncase field is a memo field that stores the search query when the 'Case Sensitive' option is not checked. When you design your SQL statement, the text '!SearchString!' should be used when designating the incoming search value. When Prevail runs a search, it will replace the text '!SearchString!' with the value the user types in the 'Search' box.
Case	The case field is a memo field that stores the search query when the 'Case Sensitive' option is checked. When you design your SQL statement, the text '!SearchString!' should be used when designating the incoming search value. When Prevail runs a search, it will replace the text '!SearchString!' with the value the user types in the 'Search' box.
Widths	If the query is SQL, the widths field will contain values for the widths of the columns in the search. Each field should have a corresponding width, followed by a comma. For instance if your search returns five fields, the value for width should be '10,10,10,10,10,'. This would set each column's width to 10.

When you have completed filling in the data for the search, click the post edit button (the check) below the grid. This will save the search record. The next time you open the Power Search, the new search item will appear in the 'Search For' drop-down box.

How To…

How to…

T his chapter provides simple step-by-step instructions on how to perform common tasks within Prevail. Basic areas of Prevail, such as the Calendar, Documents, and Claims Utility are used to categorize the topics. They will appear in alphabetical order.

General

Access e-mail

Choose Tools→E-Mail from Prevail's main menu. This will launch your preferred e-mail application (e.g. Microsoft Outlook).

Access the Rolodex

Click the 'Rolodex' button on the Prevail toolbar, or press the F3 key using the keyboard to display the Rolodex. You can then click on any of the alphabetical buttons across the top to view contacts.

Activate a new client

Click the 'Prospects' button on the Prevail toolbar. The 'Open Prospects' window will appear. Select the prospect you want to activate, and click on the 'Activate' button. You will be prompted for a case number (Prevail will suggest a default), and the prospect will then be moved to the open clients. In order to activate a prospect you must have a valid onset date and a valid Social Security Number.

Add costs to the cost ledger

First select the client for whom you want to make a cost entry. Then, click on the 'Costs' tab at the bottom of the screen. Previously entered cost entries will be displayed, as well as a total below the entries grid.

To make a new entry, click the 'Insert' button. The 'Item Description' field will change to green, notifying you that Prevail is in insert mode. Enter the following information:

- Date: The date on which the cost was incurred.

- Code: If your firm uses pre-defined accounting codes to match the requirements of your general ledger software, you can insert them onto this list, and select the appropriate code each time you make an entry. If you don't use or need accounting codes, you can skip this field.

- Check #: If the firm wrote a check for this cost, the number of the check that was written.

- Amount: The amount of the cost entry.

- To: Who the cost was paid to. If the firm wrote a check, this is the payee. If no check was written, you can leave this field blank or enter 'Firm'.

- Description: A one-line description of what the cost entry is for.

- Detail: An optional narrative description of the reason for the cost.

After you have filled in the fields described above, click on the 'Done' button. Your new cost entry will be recorded and the total outstanding costs for this client will be recalculated to reflect the new entry.

Add a medical provider

Choose Data Bank→General→Medical Providers from Prevail's main menu. You can search for an existing provider (to see if he/she is already in the database) by typing in a search string. You can also add a provider by clicking on the 'Add' button.

You can also add medical providers "on-the-fly" when you are working with clients and adding medical history. If, in the process of adding/updating medical information in a client, you want to add a new provider, the 'Add Provider' or 'New Provider' button can be used as well.

Add or edit client notes

Pull up the client for whom you want to add or edit notes. Then, either click the 'Notes' button on the Prevail toolbar, or press the F4 key. You will be placed into the notes edit mode. Your cursor will be placed at the bottom of the screen with a new entry that automatically includes your login, the current date, and the current time. Types notes as desired and close the notes window, or press the F12 key.

You will be asked to save the notes. Click the 'Yes' button and the notes will be saved.

Add a new client to the system

You can add a new client to Prevail from anywhere in the system by clicking on the 'New Call' button. The 'New Call' button lets you take information on a potential client (i.e. when someone calls on the phone) and store that information without having to put the information into your main client database. Since you don't sign up everyone you talk to, Prevail keeps your prospects in a separate database until you decide you want to either delete them or activate them (make them a client). When you activate them, all of the information you've entered is automatically moved over into the main client database.

When you click on the 'New Call' button, or press the F10 key, an entry screen will pop up allowing you to enter information on the caller. You don't need to fill in every field - just the information you want to enter. Make sure you choose a law type from the 'Law Type' drop-down so Prevail knows what type of case this caller is. When you've entered everything you want to enter on the first page, click on the 'Continue'" button and you will move to the next page of new client information. Most of these fields should be fairly self-explanatory. The second page of the new client call window contains information specific to the law type you have chosen. Notice that there is a notes field at the bottom of the second page. You can use this information to jot down notes on your conversation. This comes in handy if you refuse a case - you make a note as to why you're turning down the case. Any notes you put in here will be retained if you sign up the client, and will automatically be transferred into active client notes. When you are done entering information on the new caller, click the 'Continue' or 'Done' button. Keep in mind that this information will then be stored in the prospects database, not your main client database. It will not be moved over into your main client database until you activate it.

Add employment history

First, pull up the client to whose file you want to add employment history. Then, click on the 'Employment'. The employment page contains a list of employers on the left, and detail fields on the right. By clicking on different names in the employer list (on the left-hand side of the screen) you can display detail on different employers.

To add an employer, click the 'Insert' button at the top of the screen. The detail fields on the left of the page will turn green. Type the information into the green fields, and click the 'Done' button when you are finished. The new employer will then be added to the list.

Add a medical provider to a case

First, pull up the client for whom you want to add a medical provider. Then, click the 'Medicals' tab at the bottom of the screen. You will then see a summary of medical treatment for the currently selected client. This includes a list of medical providers that have treated the client, as well as a treatment detail for each provider. You can view the treatment history for any provider by single-clicking your mouse on the provider's name in the medical provider window. The treatment history displayed in the lower window includes dates of treatment, when medical records were last requested and when they were last received. There is also a field that indicates if the firm paid a charge for the records.

Since you see a finite number of medical providers over and over again in your files, Prevail has a database of medical providers. This allows you to simply pick a provider name off a list and have all the other information (address, phone, fax number, etc.) filled in automatically. Once you enter a provider into the database for any client, you never have to re-type the information when you encounter the same provider again in another client - you can simply pick the name off a list.

To add a provider to the currently selected client, simply click the mouse on the 'Insert' button, and click on the 'New Provider' button. You can then select from among providers in the database. If you want to insert a provider into the database, you can do so at this point by clicking on the 'Add' button. The information you enter about the provider will be permanently saved in the medical provider database. You will then be prompted to enter a treatment summary for the new provider with the current client (i.e. what they were treated for, dates, etc.).

When you click on one of the treatments listed in the 'Treatment History' list, you will be shown a detail of the treatment on the right. This information includes treatment date range, when records were last requested, when they were last received, whether your firm paid for the records and whether the SSA already has copies of these records. There is also a detail field that lets you enter notes about this medial provider as he/she relates to your client (i.e. whether the provider supports the claim of disability, etc.).

Change a Case Number

Go to the client that needs the case number changed and choose Utilities->Change Case Number. The current case number will appear in the message box. Type in the new case number and click the OK button.

Close a case

First, pull up the case you want to close. Then choose Utilities→Close Current Case from the main menu. You will be asked to confirm the action. If you click on 'Yes', the current case will be moved to the closed file area.

Make a time entry

Pull up the client for whom you want to record a time entry. Click the 'Time' tab at the bottom of the screen. To add a new entry, click on the 'Insert' button.

Print a time sheet

Pull up the client for whom you want to print a time sheet. Then, click on the 'Time' tab at the bottom of the screen. You can print the displayed time sheet by choosing File→Print from the main menu. The Prevail print options window will appear. Select the options you wish and click the 'Print' button. Next, a standard Windows print dialog will appear. If you need to change printers, do that at this time, then click the 'OK' button.

Print client notes

Pull up the client whose notes you want to print. Then press the F4 key, or click on the 'Notes' button on the Prevail toolbar. Click on the 'Print' button at the top of this window. If you want to print only a section of the notes, select the text you wish to print, click the 'Print' button, then select 'Selection' on the Windows print dialog window. Click the 'OK' button to print.

Print client information

Any tab in Prevail is printable. To print a tab, select the tab by clicking on it, then choose File→Print from the main menu. Using the Prevail Reporter, you can create custom reports that will allow you to extract more information from the Prevail database. For more information on the Prevail Reporter, see the Prevail Reporter manual.

Print a cost ledger

First, pull up the client whose cost ledger you would like to print. Then, access the cost ledger for that client by clicking on the 'Cost' tab. Once the ledger is displayed, you can print it by choosing File→Print from the main menu.

Re-index files

All database software needs to have the files periodically re-indexed to protect the data and ensure that the program operates properly. To re-index files in Prevail, you must first exit the program (and have all other users exit the program as well), and run the Prevail Control Panel program which should appear in the Prevail group in your Windows Start→Programs menu. Click the 'Reindex' button and Prevail will automatically rebuild all of its indexes.

If you cannot find this program, you will need to install it. See the chapter titled 'Installing the Software'.

Review prospective clients

Rather than forcing you to immediately enter prospective clients into your main client database, Prevail allows you to enter them into a 'prospects' table that you can track separately from your active clients. When you sign up a prospect, you can automatically transfer all data from that prospect into your main client database with a single click of the mouse.

To view or edit information on a person in your prospect database, click the 'Prospects' button on the Prevail toolbar. To review a prospect, select the prospect and click the 'Review' button. The prospect's information will be displayed. If necessary, update any client information and click the 'Continue' button. On the second page of data, enter any necessary information and click the 'Continue' or 'Done' button. This will increment the 'Tries' field and set today's date in the 'Last Try' field.

Search for client

You can view a different client from anywhere in Prevail by clicking on the 'Search' button on the Prevail toolbar. The 'Quick Search' window will appear. Enter the client's last name and click the 'Search' button. To select the client, double click the client's name, or select the client and press the Enter key.

If you want to use a more powerful search, choose Tools→Power Search from the main menu. This will allow choosing from a number of searches. For more information about searching, read the chapter titled 'Search'.

Update client information

Client information is accessed and modified through the page tabs at the bottom of the window. You view the different pages of data for each client by clicking on the corresponding tab for the page you want. To update the data on a particular page, click on the 'Update' button. You can then click on any field you wish to update. When in update mode, the fields that you can edit are yellow. Note that some fields are "fill-in-the-blank" fields, while others have pull-down menus that allow you to select from among pre-defined entries. When you are finished updating the current page, click on the 'Done' button.

Calendar

Complete a to-do

Access the to-do list either by pressing the F6 key, or by clicking on the 'Calendar' button, and then clicking on the 'To-Do' tab. Highlight the to-do you want to mark as completed, then click on the 'Complete' button at the bottom of the To-do page.

Print a to-do list

Access the to-do list by pressing the F6 key, or clicking on the 'Calendar' button then clicking on the 'To-do' tab of the Calendar. Then, click the 'Print' button at the bottom of this page.

Print a calendar

Access the calendar by pressing the F8 key, or by clicking on the 'Calendar' button on the Prevail toolbar. Next, click the 'Print' button at the bottom of this page.

Reschedule an appointment

If you've got an appointment scheduled and you want to move it to a different date and time, simply double-click on the appointment (you must first be in the calendar) and edit the date and time as necessary. After you click the 'Done' button, the appointment will be moved to the new date and time. If you need to keep records of rescheduled appointments, you can cancel the appointment, put a note in the description that denotes it as rescheduled, then create a new appointment with the new date and time.

Schedule an appointment

You can schedule an appointment by choosing File→New Appointment from the Prevail menu. You can also click on the 'Calendar' button on the Prevail toolbar, or press the F8 key. The calendar will display the current day with any scheduled appointments. Select the day you wish to schedule the appointment on, then click the 'Add' button on the 'Appointments' tab. Fill in the information about the appointment and click the 'Done' button to save it.

Set a to-do

You can set a to-do by choosing File→New To-Do from the main menu, or by opening the calendar and clicking the 'Add' button on the 'To-do' tab. Enter the information about the to-do, and click the 'Done' button. The information will then be recorded and the to-do will begin showing up on the to-do list of the appropriate person on the date entered in the 'Due' field.

Documents

Generate an SSA form

If the current case is a Social Security case, click the 'Forms' button and choose 'Forms' from the drop-down menu. A list of all available SSA forms is displayed. You can choose a form from this list by clicking the form name. Since Prevail can track up to three claims per client, you can also choose which claim you want this form to be associated with. 'Claim 1' is the default since there is seldom more than one claim filed concurrently for each client.

After you have chosen a form and claim, click the 'Ok' button and your form will be merged. Your word processor will be launched if it is not already running and your client data will be merged into the SSA Form. If there is any information required by the form that is not included in Prevail, you will be prompted to enter it as the form is merging.

After the merge is completed, the document will be saved automatically. If you make any changes to it after it is saved, remember to re-save it (using the same name Prevail has already given it) before exiting your word processor. You can either exit your word processor at this point or simply switch back to Prevail using the ALT-TAB keys.

Note that every time you merge an SSA form, Prevail automatically updates the claim status and makes an entry in the current client's document history.

Generate a letter

If the current case is a personal injury case, click the 'Forms' button or press the F5 key. If the current case is a social security case, click the 'Forms' button and choose 'Letters' from the drop-down menu. A list of available letters will appear according to the current cases' law type. These letters are completely user-definable. You can create as many of your own form letters as you like, and organize them any way you wish.

The 'Group' field is used to organize letters, which is a searchable field. You can type in the name of the group you want to search for and you will be taken directly to the first document of that group. Our sample documents are grouped based on whom they are to. That is, client letters are in the 'CLIENT' group, letters to the ALJ are in the 'ALJ' group, etc.

To select a letter to merge, simply click the letter (you can get there either by searching or scrolling), and click on the 'OK' button.

When you do this, you will be shown a summary of the information that will be automatically entered into the 'History' page for this client. You can change any of this information at this point if you desire (e.g. how much time to bill the file, who gets the reminder, etc.).

When you click on the 'DONE' button, Prevail will gather up all required information on the currently selected client, load your word processor (if it's not already running), pull up the selected form letter, merge your client information into the form letter, and save the finished product for you.

If the letter requires any information not already entered into the system, the merge will be paused and you will be prompted to enter it manually.

You can make any changes you like to the letter at this point. If you make changes, remember to re-save the document (with the document number that Prevail has already given it) before exiting or minimizing your word processor.

You can switch back to Prevail (using the ALT-TAB keys) whenever you want. As long as you have sufficient memory, you can keep Prevail and your word processor running concurrently.

Every letter you create in this manner is automatically saved for you on the 'History' page for this client.

Viewing documents
Pull up the desired client and click on the 'History' tab. Select the document you would like to view, and click the 'View' button. The document will be opened in the appropriate program.

Personal Injury

Add a new defendant
Click the 'Defendant' tab of the case you want to add a defendant to. Click the 'Insert' button. Fill out the information about the new defendant, and click the 'Done' button to save it. Prevail will then perform a simple conflict of interest search that scans open and closed cases to see if the defendant you are entering was a client of yours at one time. Note that Prevail will not search for conflicts with friendly doctors or insurance providers.

Add a new hearing
Click the 'Court' tab of the case you want to add a hearing to. Click the 'Insert' button and fill out the information about the hearing. When finished, click the 'Done' button to save the hearing. Note that all hearings entered on the 'Court' page will automatically be added as an appointment in the calendar. Hearings created in the calendar will not be added to the 'Court' page.

Add a third party
On the case you wish to add a new party to, click the 'Parties' tab. Next, click the 'Insert' button to bring up the 'Related Party' window. Select the type of party from the 'Type' drop-down box. Click the 'Choose' button to choose the party. If necessary, fill out any notes or insurance information in the fields provided. Click the 'Done' button to save the party.

Editing a party's contact
On the 'Parties' tab, choose the party that you want to change the contact information for. Click the 'Update' button. The 'Contact Information' section will

turn yellow indicating that you are in update mode. Enter the new information and click the 'Done' button to save it.

Social Security

Add a new claim to case

First, pull up the client for whom you want to add a claim. Then, click on the 'Claims' tab at the bottom of the screen to access the claim history page for that client. If there is no claim currently being tracked for the client, the 'Chronology' will be blank. You can create a new claim by clicking on the 'Update'. You will be asked to start a new claim. Respond by clicking on the 'Yes' button. The system will then ask if this is a new (i.e. initial application level) claim or a pending claim (i.e. the claim is already at some point in the process other than initial application). If this is a pending claim, you will be asked to select a current status for the claim.

If there is already a claim pending on this client's case, you can add another one by clicking on claim number 2 or claim number 3 and adding a new claim as described above.

Add disability information

Pull up the client for whom you want to add disability information. Click on the 'Disability' tab at the bottom of the screen. There are two parts to this screen. The top window contains a short listing of each medical problem the client has, and the bottom contains a narrative description which allows you to, in the client's own words, detail his or her medical problems and how they affect daily activities. You can print this information as an addendum to the SSA forms.

To add a new disability entry, click the 'Insert' button at the top of the screen (you can also delete impairments by clicking the 'Delete' button). When you click the 'Insert' button, the fields to the right of the list will turn green, notifying you that the system is in insert mode. The fields are used to list how long the client has had the problem, any workload limitations caused by the problem and any treatment the client receives for the problem. There is also a numeric field (i.e. 1-9) for you to list your own subjective evaluation of the severity of each problem. When you are finished entering specific information for a disability, click the 'Done' button.

To add information to the 'Claimant's Description of Disabilities' field, click the 'Update' button. Type the desired text in the window and click on the 'Done' button when you are finished.

Attach an ALJ

First, pull up the desired client. Then select the SSA office page by clicking on the 'Offices' tab at the bottom of your screen. This page displays names and phone numbers for SSA office, Examiner, ALJ, and long-term disability insurance

provider. You can view the detail on any one of these parties by clicking on the magnifying glass icon to the right of the name. This will give you full name, address, and phone number of the party.

To add an ALJ to a case, click on the 'Update' button. Then, click the 'Choose' button next to the ALJ field. If the name you want doesn't appear on the list, you can add it to the list by clicking the 'Add' button. Once you have selected the ALJ, click the 'Done' button to attach it to the case. Click the 'Done' button to save the new ALJ.

Attach an SSA office

Prevail 3.9.2 has the ability to automatically select the SSA office by using the client's zip code. However, this is only done when the prospect is activated. Therefore, you must fill in the prospect's correct zip code before activation to automatically select the SSA office. If the zip code is blank, an arbitrary SSA office is selected, or none at all.

If the client is already active, pull up the desired client. Then select the SSA office page by clicking on the 'Offices' tab at the bottom of your screen. This page displays names and phone numbers for SSA office, Examiner, ALJ, and long-term disability insurance provider. You can view the detail on any one of these parties by clicking on the magnifying glass icon to the right of the name. This will give you full name, address, and phone number of the party.

To add a SSA office to a case, click on the 'Update' button. Then, click the 'Choose' button next to the 'SSA Office' field. If the name you want doesn't appear on the list, you can add it to the list by clicking the 'Add' button. Once you have selected the SSA office, click the 'Done' button to attach it to the case. Click the 'Done' button to save the new SSA Office.

Attach an examiner

First, pull up the desired client. Then select the SSA office page by clicking on the 'Offices' tab at the bottom of your screen. This page displays names and phone numbers for SSA office, Examiner, ALJ, and long-term disability insurance provider. You can view the detail on any one of these parties by clicking on the magnifying glass icon to the right of the name. This will give you full name, address, and phone number of the party.

To add an examiner to a case, click on the 'Update' button. Then, click the 'Choose' button next to the 'Examiner' field. If the name you want doesn't appear on the list, you can add it to the list by clicking the 'Add' button. Once you have selected the examiner, click the 'Done' button to attach it to the case. Click the 'Done' button to save the new examiner.

Attach a LTD insurance provider

First, pull up the desired client. Then select the SSA office page by clicking on the 'Offices' tab at the bottom of your screen. This page displays names and phone numbers for SSA office, Examiner, ALJ, and long-term disability insurance provider. You can view the detail on any one of these parties by clicking on the magnifying glass icon to the right of the name. This will give you full name, address, and phone number of the party.

To add a LTD provider to a case, click on the 'Update' button. Then, click the 'Choose' button next to the 'Long Term Disability Provider' field. If the name you want doesn't appear on the list, you can add it to the list by clicking the 'Add' button. Once you have selected the LTD provider, click the 'Done' button to attach it to the case. Click the 'Done' button to save the new LTD provider.

Update the status of a claim

To update the status of a claim, you must first be on the 'Claims' page. Once you are on the claims page, you will see a chronology of the selected claim. Note that on the right side of the window you can choose Claim 1, 2, or 3. While you normally only have one claims filed for each client, Prevail gives you the ability to independently track up to three concurrent claims. You can select the desired claim to update by clicking on the appropriate claim number. 'Claim 1' is the default, and its status will be displayed if you do not click on another claim number. Once the desired claim is displayed, you can update its status by clicking on the 'Update' button. Prevail always knows what happens next in a claim, and you will be prompted to input pertinent information about this change in status. After you respond to the prompts, the updated status of the claim will be displayed.

Chapter

12

The Prevail Control Panel

Maintaining the Prevail system

T he Prevail Control Panel is used to maintain the Prevail system. At least one machine in the office should have the Control Panel installed on it, preferably the machine of the system administrator. The Control Panel is used to reindex the database, pack the database, add new users to the system, and broadcast system-wide messages to all users running Prevail. If the Control Panel has not been installed, please see the chapter titled 'Installing the Software'.
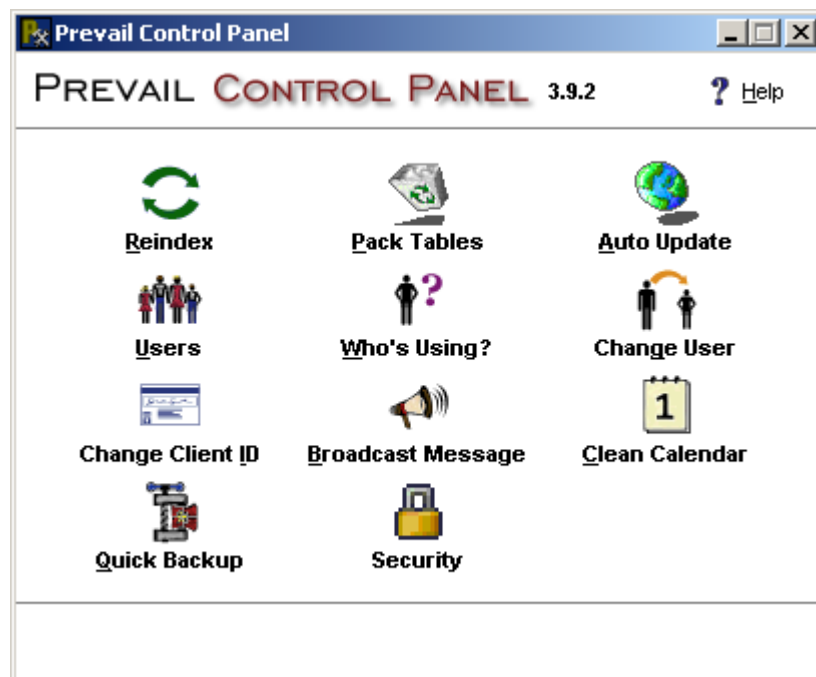
Reindex

There may be times when you are using Prevail that the data will appear out of order or mixed up. For instance, clients will seem like there are not sorted, the wrong to-dos show for the wrong user, or a case's status appears unsorted or completely wrong. This means that the indexes have been corrupted. This is similar to a libraries card catalog (if any library still uses a card catalog) being out of order. Prevail can't find the data where it should be, and thus shows arbitrary data. The fix for this is simple.

After everyone has logged out of Prevail, run the Control Panel by choosing Start→Programs→Prevail→Control Panel, or double-clicking the Prevail Control Panel shortcut on the desktop. Click the 'Reindex' button to start the Reindex. When the Reindex has completed, close the Prevail Control Panel. Everyone can then log back into Prevail.

Pack Tables

Packing the tables will remove all records marked as deleted. When you delete a record in Prevail, the physical record is not removed from the database. It is marked as deleted, which means it will not show up in Prevail. Unlike most database file formats, Prevail uses a format that will sequentially overwrite records marked as deleted to conserve space, instead of creating a new record. However, there still may be a need to pack the database to remove those deleted records, or refresh the database for optimization.

After everyone has logged out of Prevail, run the Control Panel by choosing Start→Programs→Prevail→Control Panel, or double-clicking the Prevail Control Panel shortcut on the desktop. Click the 'Pack Tables' button to being the packing. When the pack has completed, close the Prevail Control Panel. Everyone can then log back into Prevail.

Auto Update

The Auto Update feature is used to automatically search and download the latest Prevail components. You must have an established Internet connection before attempting to run the Auto Update.

To search for new components, click the 'Auto Update' button. The Control Panel will download a file that contains the information of the latest version of Prevail and compare it to the list component version list. If any components need upgrading, the 'Auto Update' window

will appear with a list of components. To download and apply the components, place a check next to the components you wish to update. Click the 'Download and Apply Updates' button. The Control Panel will download the selected components, update the version list, then apply any updates if accessible. Some components, such as the Prevail client application and the Control Panel will prompt you to run the update the next time you try to run the programs.

Users

If you need to add a user to the Prevail system, click the 'Users' button. In order to add or remove the user from the system, you must have 'Super User' security. You will be prompted to enter your login and password. Enter them accordingly, making sure you capitalize your login. Once your login has been accepted, the User Utility will appear.
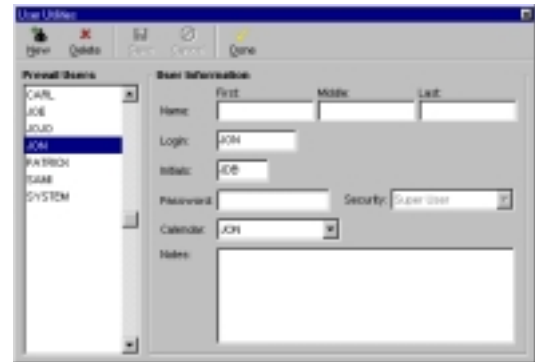
The 'Prevail Users' list located on the left side of the window, displays a list of all users currently in the system. To add a new user to the system, click the 'New' button. Fill in the information, then click the 'Save' button to save the user, or click the 'Cancel' button to cancel adding the user to the system. When adding a user, make sure that the 'Login' of the new user is unique, and does not exist in the 'Prevail Users' list. When finished with user utilities, click the 'Done' button.

Who's Using?

Who's Using will tell you who is currently logged into Prevail. Click the 'Who's Using' button. If anyone is logged into Prevail, a window will appear with a list of users. If you wish to send the users a system message, place a check next to the user to receive the message, or click the 'Check All' button to check all of the users, and click the 'Send Message' button. Enter the message to send and click the 'OK' button. To close the 'Users Logged In' window, click the X in the upper right hand corner, or press the Esc key on the keyboard.

Change User

There are times that you will need to reallocate a user's responsibility. For instance, if one of your case managers leaves the firm, you will need to assign all of the user's responsibilities to someone else. To do this, click the 'Change User' button. Enter the old user's login, making sure it is all capitalized, and click the 'OK' button. Next, you will be asked to enter the new user's login, making sure it is all capitalized. Click the 'OK' button to start changing the users. The status and the number of changes will be displayed as it scans the Prevail database.

Change Client ID

Sometimes a client's internal Client ID is not acceptable, especially in conversions from older versions of Prevail. When a client ID is invalid, such as contains an illegal character for a folder name, Prevail cannot save notes or documents for that case. Unless you absolutely need to change a client's ID, it is recommended that you do not.

To change a client's internal ID, click the 'Change Client ID' button. Enter the old client ID (if in Prevail it is the second set of numbers on the Case Summary screen, like 'Ada2348A'), using the correct capitalization, and click the 'OK' button. Next, enter the new client ID and click the 'OK' button. The Control Panel will begin to scan the tables making the appropriate changes.

Broadcast Message

Prevail 3.9.2 has the very beginning of a future complex messaging system built in. Eventually, you will be able to perform many tasks from the Control Panel on a particular user's machine, or on everyone's machine. However, Prevail 3.9.2 has only a basic messaging system.

You can send a message to all users using Prevail by clicking the 'Broadcast Message' button. Enter the text you wish to send to all users running Prevail, and click the 'OK' button.

Commands
As mentioned earlier, this is just the beginning of a rather complex messaging system. The only command used by Prevail at this time is the TIMEHSHUTDOWN command. The TIMESHUTDOWN command will broadcast a message to all users running Prevail, setting an internal timer for five minutes. Once the five minutes have expired, Prevail will close by itself on every machine that received the message.

To use the TIMESHUTDOWN command, click the 'Broadcast Message' button, type, "/TIMESHUTDOWN Please shutdown Prevail. Prevail will automatically close in 5 minutes," and click the 'OK' button.

Clean Calendar

Old appointments and to-dos that are no longer needed, do nothing but slow down the calendar. To remove older calendar data, click the 'Clean Calendar' button. For both the 'Appointments' and 'To-do' section, set a cutoff date to remove all data before that date. Click the 'Clean' button to remove the data
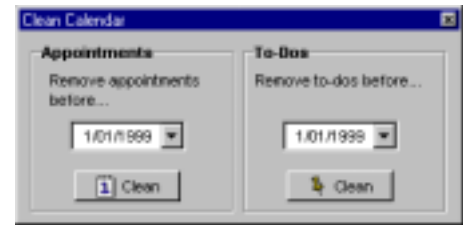
Quick Backup

The 'Quick Backup' will create a ZIP file of your Prevail database files, and store them in the P:\Prevail\Backups directory, where P:\ is your mapped server drive. The 'Quick Backup' does not backup your documents, client folders, or any other documents within the Prevail directory. You should still run a tape backup or some other form of backup on a regular basis.

If you ever need to restore from a 'Quick Backup', you will need a ZIP program such as PKUnzip or WinZip.

Security

'Security' allows you to set non-Super user privileges such as the ability to add/edit/delete merge letters and forms, activate/close/delete prospects, close/delete cases, modify firm-wide options and use the Claim Utility. You must be a Super User before you can modify the security options.

Chapter

13

The Prevail Reporter

'Now that I have this data, what can I do with it?'

T he Prevail Reporter is used to extract information from the Prevail database that cannot otherwise be done with the Prevail program. The Reporter comes with many standard reports, but you may find a need to create or customize your own reports as you begin to use the Prevail system.

As with any software package, it takes time to learn how the software works. The Prevail Reporter is no exception. Before you start creating reports, you must first understand the concepts of reporting. This manual will attempt to guide you through the Prevail Reporter, the basic concepts used in reporting, tips and tricks that will make for a more productive report, and how you will benefit from the Prevail Reporter.

Installing the Reporter

Before you can use the Reporter, you must install it on each workstation that will be running the Reporter. To install the Reporter, place the Prevail CD into the CD-ROM drive. If Auto Run is enabled, the install menu will automatically appear. If it does not, simply run D:\Install.exe, where D is the letter of your CD-ROM drive.

Click the 'Install Reporter' button to launch the Prevail Reporter Install program. Step through the install wizard. When it asks for a location, set it to C:\Prevail\Reporter, if it is not already set. Once you have completed the install, it will add a shortcut to your desktop and to your Start→Programs→Prevail menu.

If the Reporter was installed on a workstation that is not running Prevail, be sure you install the Prevail Client before attempting to run the Reporter. You must

correctly configure Prevail before running the Reporter. For information on installing the Prevail Client, see the Prevail user manual.

The Reporting Concept

The Prevail Reporter uses a master-detail database relation. Before you even begin to create the report, you must know exactly how the database files, or tables, will interact with each other. While the Prevail Reporter does its best to help guide you through these relationships, it is still best to understand how the relationships within the Prevail database are defined.

The master table is the most important table in the report. It is the first database file you use in your report. It serves as a guide throughout the report construction, and gives the report builder direction. Since we are dealing mainly with client-based reports, more than likely, the master table will be the client table, *pvclient*.

After you have decided how your report will run and which table will be the master table, each additional table you add to the equation has to relate somehow to the master. When you add tables, you will be prompted to set a relationship between the table you are adding, and a table that is already in your report. A list of possible relationships will be provided when you attempt to set a relation. Select the relationships you want to use, and remove the rest from the list. In most cases, you must match the codes, or fields, to complete the relationship. For instance, if you were creating a report based on clients, *pvclient,* and wanted to show each client's ALJ, you would set the relationship between *pvalj.aljcode* and *pvclient.aljcode*. The Reporter will use these two fields to communicate to each other.

When the Reporter begins to build the report, it will look at the relationships, determine which is the master, and proceed to go through the master table adding the fields it needs to the report database. When it comes to a field that is in a detail table (something in *pvalj* using the above example) it will find the value of the relational field, *pvclient.aljcode*, then seek into the detail table, *pvalj,* using that value. If it finds the value, it will move to that record, then export the values it needs.

The Prevail Reporter uses SQL (Structured Query Language) to filter and query data for each report. If you are knowledgeable of SQL, you will have an easier time creating reports. If you would like to learn more about SQL, you can pick up a book from your local bookstore or online vendor, or search the Internet for online resources.

Running the Reporter

After the Reporter has been installed, you can double-click the 'Prevail Reporter' icon on your desktop, or choose Start→Programs→Prevail→Prevail Reporter. When the Reporter loads, you will see a list of folders on the left side of the window. These are used to categorize the reports. If you double click on a folder, a list of reports in that folder will be visible. To preview a report, double click it. These reports are standard reports that come with Prevail, but you may find the need to personalize these reports, or create new ones. To print a report, choose File→Print, or click the ▤ button.

Reporter Settings

Since the Prevail Reporter uses the same settings as the Prevail client application, there probably will not be a need to change the Reporter's settings. To access the settings, choose Options→Settings from the main menu. If you are running the Advantage Database Server, make sure the 'Database Server' option is set to 'Remote', otherwise set it to 'Local'. If the machine is part of a network, check the 'Machine is on a Network' option. This will allow Prevail to receive system messages. The 'Network Path' is the path the Prevail data resides in. The 'Local Path' is the path to your local Prevail directory. This should be set to C:\Prevail for most installs. The 'Merge Path' can be any directory, but it usually is the same as the 'Local Path'. The Prevail Reporter must be restarted after making changes to the settings.
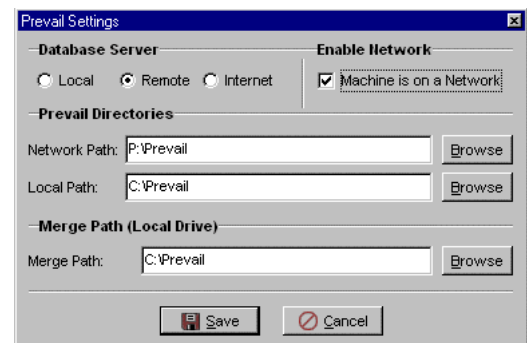
The Reporter Interface

The Prevail Reporter interface is fairly simple to understand. Reports are organized similar to the way you would organize groups of papers that pertain to a particular subject -- in folders. Each folder is a category and a batch. You can create as many folders as your firm needs, and each folder can hold as many reports as necessary.
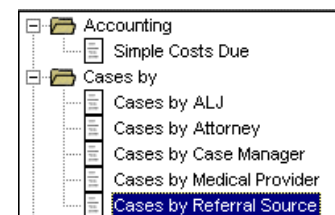
Folders are Good

As stated above, the folders are used to organize or group reports. To create a new folder, choose File→New Folder, or click the 🗁 button. Make sure you give each new folder a unique name. After you enter a name, you will see the folder's properties window. This is where you can turn a folder into an automated batch by enabling the 'Scheduled Run' properties.
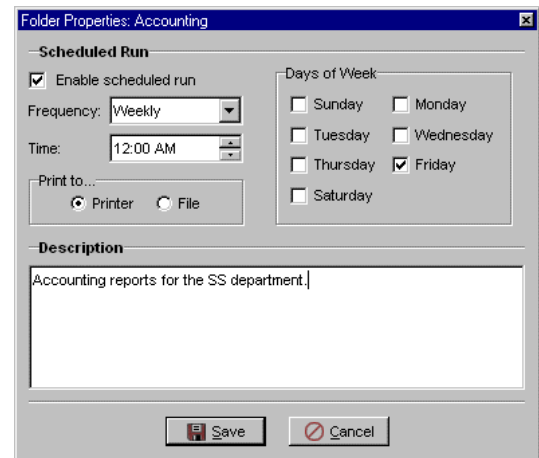
If you double click a folder, the list of reports stored in that folder will appear. You can move reports from one folder to another by dragging the report onto a new folder. You can rename folders or reports by selecting it, then clicking the item's name. A box will appear around the highlighted text. You can rename the item and hit the enter key when you are finished, or hit the Esc key to cancel renaming the item.

Reports

Each report is stored in a folder for organization. If you open a folder and click on a report, you will see the report's description in the lower left hand corner of the Reporter. The report's description is used to differentiate reports by something other than its name. To preview a report, double click it.
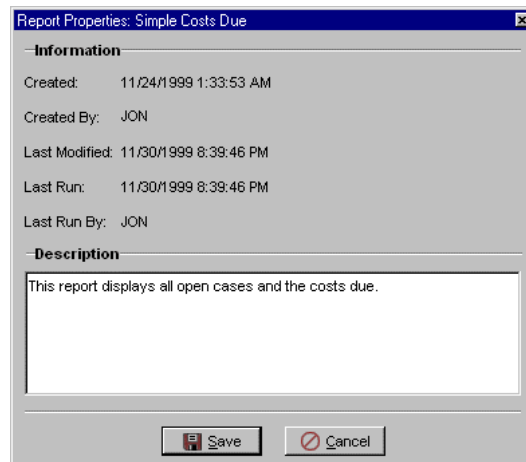
Like folders, reports also have properties. To view a report's properties, select a report and choose File→Properties from the main menu. Here, you can edit a report's description, or view information such as when the report was created, last modified, last ran, who created it, or who was the last user to run the report.

Folder and Report Toolbar

The Folder and Report Toolbar provides shortcuts to some of the same options found in the main menu.

Action	Icon	Description
New Folder		Creates a new folder.
New Report		Creates a new report template and opens the Report Designer.
Edit Report		Opens the selected report in the Report Designer for editing.
Delete Folder/Report		Deletes the selected folder or report.
Search		Search for a report by name or description.
Refresh Reports		Refresh list of folders and reports.

Preview Toolbar

The Preview Toolbar provides functionality and options that pertain to the preview of a report.

Action	Icon	Description
Print		Print the report.
Page View		Shows a full-page preview of the report.
Width View		Displays the report at the width of the preview window.
Full Size		Displays the actual report size.
Zoom		Changes the zoom percentage.
First Page		Goes to the first page of the report.

Previous Page	◀	Goes to the previous page in the report.
Page Number		Skip to an arbitrary page number
Next Page	▶	Go to the next page in the report.
Last Page	▶❘	Jump to the last page in the report.

Report Search

As your list of reports grows, looking for that one report may become more of a task than it should. While folders have more upside than down, one downside is that it makes looking for a single report more difficult. Instead of clicking through folders, use the Report Search by choosing Tools→Search from the main menu. The Report Search scans each report's name and description for a possible match. The search is case insensitive and looks for parts of words, or whole words. When the search has completed, click on a report and the report will be selected in the Prevail Reporter.
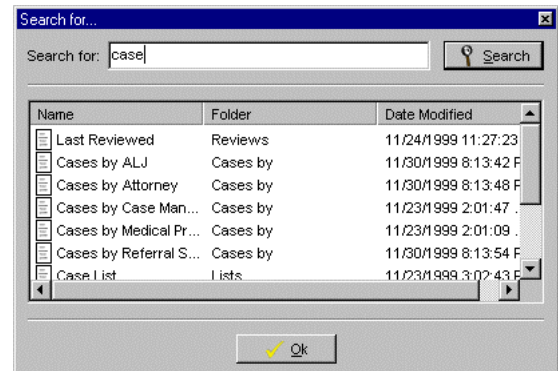
The Report Designer Interface

The Prevail Reporter interface, as you just saw, was pretty straightforward. The main objective of the Prevail Reporter interface is to provide logical organization for your reports, and simple access to functionality such as previewing or printing a report. The bulk of the Reporter's interface actually lies in the Report Designer. This is the interface that is used to create and modify reports. If you can master the Report Designer, you can surely master the art of reporting. The following text has been taken from Digital-Metaphors Corporation's ReportBuilder Developer's Guide.

Design Tab

The design workspace is where the report layout is created. This workspace contains all of the menus, toolbars, and dialogs that make up the Report Designer.
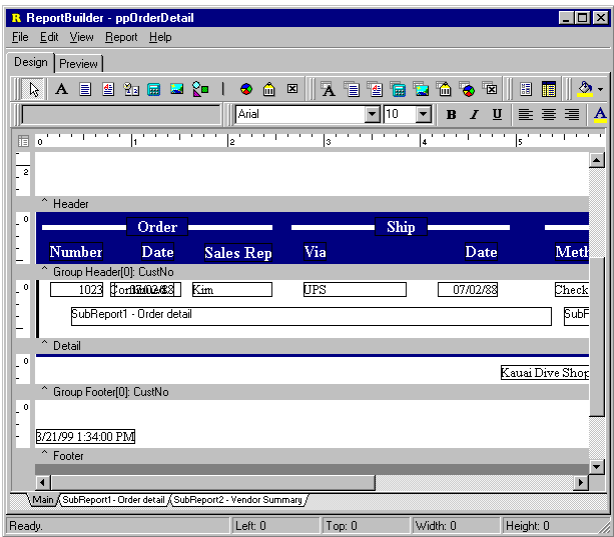
Preview Tab

The Preview workspace shows a representation of the report as it will appear when printed to the printer. The iterative process of perfecting a report is generally accomplished by moving back and forth between the Preview and Design tabs of the Report Designer.
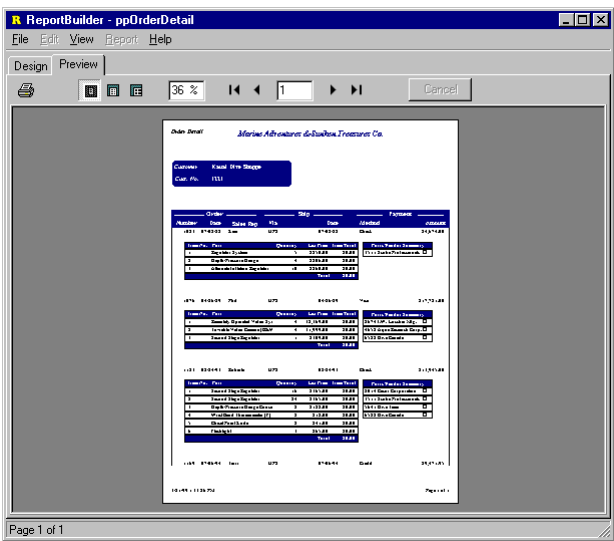
Print Dialog

The Print Dialog is automatically displayed when the report is sent to the printer. This dialog allows you to select the pages, number of copies and printer for the report.
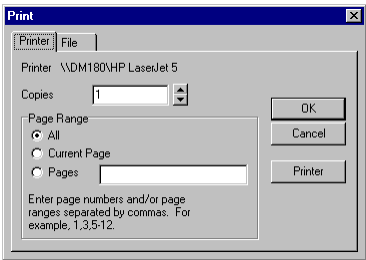
The print job settings can be set via the 'Printer' tab.

Print to file options can be set via the 'File' tab.
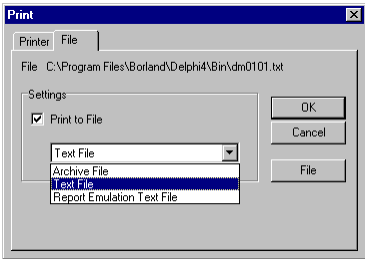
Page Setup

The Page Setup dialog can be accessed from the File→Page Setup menu option of the Report Designer. You set the following from within the Page Setup dialog:

Paper size and orientation
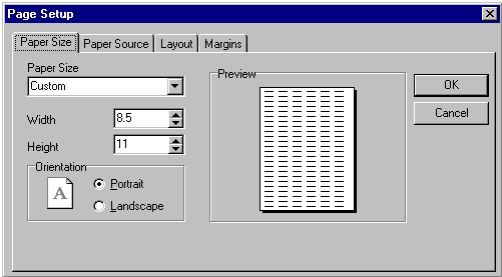
Paper Source
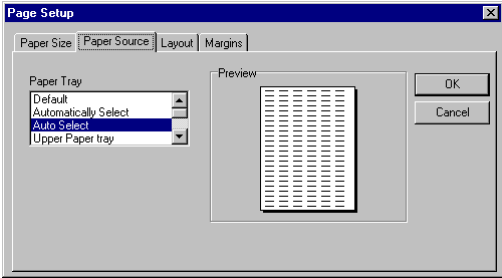
Layout for Columnar Reports
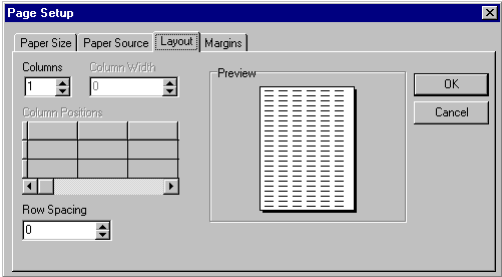
Margins
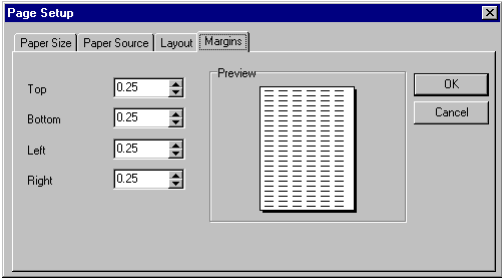
Groups Dialog

The Groups dialog is accessible via the Report→Groups menu option of the Report Designer. You can separate your report into different sections using groups. A number of options are available to control the behavior of each group. For example, you may want each group to start on a new page or to reprint the group header when the group continues on additional pages. Another powerful feature is the Keep group together option that can be used to ensure all of the information for a group fits on a page.
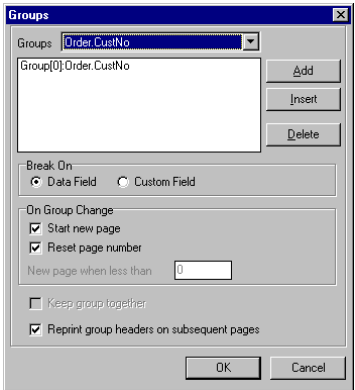
Print to File Setup Dialog

The Print to File Setup dialog is accessible via the File→Print to File Setup menu option of the Report Designer. This dialog is used to specify the format and content of the ASCII file that will be created if the report is printed to file.
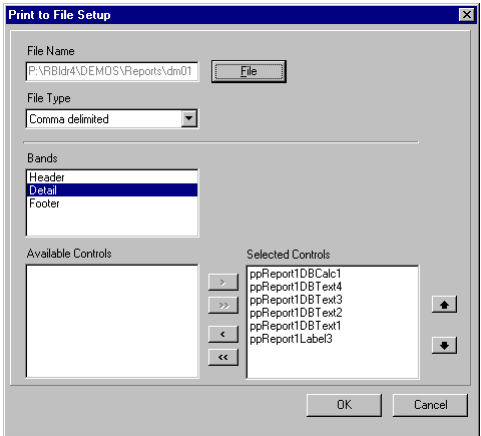
Data Dialog

The Data dialog can be accessed from the Report→Data menu option of the Report Designer. It can be used to specify the master and detail data pipelines for the report. Note: The detail data pipeline is optional.
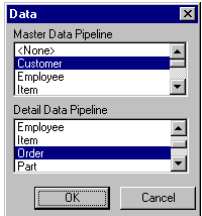
Toolbars

The various toolbars accessible from the design workspace are documented in this section. The toolbars are dockable and follow the Office97 interface style. The Toolbars are accessible from the View→Toolbars menu option of the Report Designer or by right clicking on the docking area at the top of the Report Designer.

The Report Tree

To access this tool window, select the View→Toolbars→Report Tree menu option from the Report Designer main menu. This tool window is dockable only on the left and right sides of the Report Designer. It can be used to organize components within each band. Components selected in the Report Tree are selected in the report layout. The upper portion of the Report Tree shows the main report object and any sub reports nested within it. This can be helpful for organizing your sub reports.
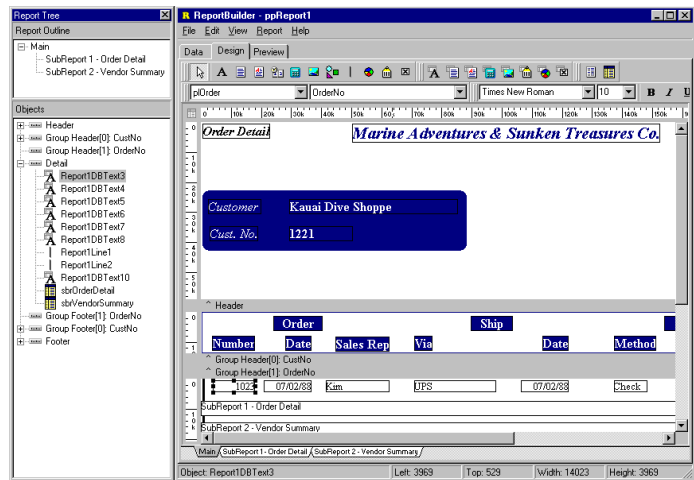
The Data Tree
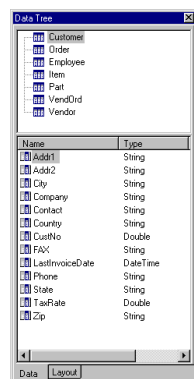
To access this tool window, select the View→Toolbars→Data Tree menu option from the Report Designer main menu. This tool window is dockable only on the left and right sides of the Report Designer.

Standard Component Palette

To access this toolbar, select the View→Toolbars→Standard Components menu option from the Report Designer main menu. This toolbar will assist in creating the most commonly used report components.

Component	Icon	Description
Label		Used to display text. Assign the Caption property to control the text value. You can have the label resize automatically to fit a changing caption if you set the AutoSize property to True.
Memo		Used to print multiple lines of plain text in a report. To set the value, assign a string list to the Lines property. To dynamically resize the memo during printing, set the Stretch property to True. Use the ShiftRelativeTo property to define dynamic relationships with other stretchable objects.
RichText		Used to print formatted text. To set the value, assign the RichText property or use the LoadFromFile orLoadFromRTFStream methods. Use the ShiftRelativeTo property to define dynamic relationships with other stretchable objects. At design-time you can use the ReportBuilder's built-in RTF Editor to load, modify, and save rich text data stored in files.
SystemVariable		Used to display common report information such as page number, page count, print date and time, date, time, etc. The format is controlled by the DisplayFormat property.
Image		Used to display bitmaps and windows metafiles in reports. Assign the Picture property of this component in order to place an image in your report. Use the Report Designer's built-in picture dialog to load images at design-time.

Shape		Use this component to print various shapes (squares, rectangles, circles, ellipses) Set the Shape property to select a type of shape. Use the Brush and Pen properties to control the color and border.
TeeChart		Used to display standard (non-data-aware) TeeCharts. This component enables you to use TeeChart inside the Report Designer. You can access the TeeChart editor via a popup menu.
BarCode		Used to render barcodes. The string value assigned to the Data property is encoded based on the BarCodeType. If the data to be encoded is in a database, use DBBarCode. The following symbologies are supported: Codabar, Code 128, Code 39, EAN-13, EAN-8, FIM A,B,C, Interleaved 2 of 5, PostNet, UPC-A, UPC-E.

Data Component Palette

To access this toolbar, select the View→Toolbars→Data Components menu option from the Report Designer main menu. This toolbar will assist in creating data-aware report components.

Component	Icon	Description
DBText		Used for displaying values from all types of database fields. Use the DisplayFormat property to format the value.
DBMemo		Used to print plain text from a memo field of a database table. This control will automatically word-wrap the text. Set the Stretch property to True and the component will dynamically resize to print all of the text. Use the ShiftRelativeTo property to define dynamic relationships with

Component	Icon	Description
		other stretchable objects.
DBRichText		Used to print formatted text from a memo or BLOB field of a database table. This control will automatically word-wrap the text. Set the Stretch property to True and the component will dynamically resize to print all of the text. Use the ShiftRelativeTo property to define dynamic relationships with other stretchable objects.
DBCalc		Used for simple database calculations (Sum, Min, Max, Count and Average.) The value can be reset when a group breaks using the ResetGroup property.
DBImage		Used to print bitmaps or windows metafiles, which are stored in a database BLOB field.
DBBarCode		Used to render barcodes based on the BarCodeType and the value supplied via the DataField property. The following symbologies are supported: Codabar, Code 128, Code 39, EAN-13, EAN-8, FIM A,B,C, Interleaved 2 of 5, PostNet, UPC-A, UPC-E.
DBTeeChart		Allows data-aware TeeCharts to be placed within a report.

Advanced Component Palette

To access this toolbar, select the View→Toolbars→Advanced Components menu option from the Report Designer main menu. This toolbar will assist in creating advanced report components.

Component	Icon	Description
Region		Used to logically group components together. Use the ShiftRelativeTo property to move the region in relation to another dynamically

|		resizing component (such as Memo, RichText or child-type SubReport.)
SubReport	📖	Used to handle multiple master details, create side-by-side reporting effects and hook reports together as one. If you need a report to print within the context of a band, use a child-type subreport. If you need to hook reports together use a section type subreport. The PrintBehavior property determines the subreport type.

Standard Toolbar

To access this toolbar, select the View→Toolbars→Standard menu option from the Report Designer main menu. This toolbar will assist saving the report layout, accessing the print and print preview and cut and paste operations.

Component	Icon	Description
New Report	🗋	Creates a blank report layout.
Open Report	📂	Displays the Open dialog, allowing you to open an existing report layout.
Save Report	💾	Saves a report layout to file.
Page Setup	📖	Displays the Page Setup dialog, allowing you to set the paper size and configure the layout for the report.
Print	🖨	Displays the Print dialog before sending the report to the printer.
Print Preview	🔍	Displays the Print Preview window.
Cut	✂	Cuts the currently selected components into the clipboard.
Copy	📋	Copies the currently selected components into the clipboard.
Paste	📋	Pastes the components in the clipboard into the report.

Edit Toolbar

To access this toolbar, select the View→Toolbars→Edit menu option from the Report Designer main menu. This toolbar will assist in setting the most important property or properties for the currently selected component.
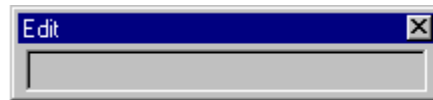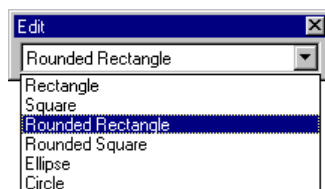
No component selected.
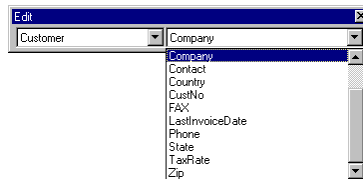
Data-aware component selected.

This configuration allows the data pipeline and data field for the component to be set. The drop-down list on the left shows the data pipeline. The drop-down list on the right shows the field name.

Label component selected.

Here a label component has been selected in the Report Designer. The Edit toolbar displays an edit box where the label's caption can be set.

Shape component selected.

Here a shape component has been selected in the Report Designer. The Edit toolbar displays the different shape types.
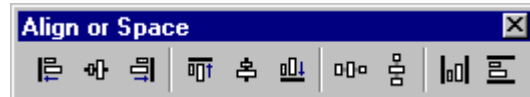
Format Toolbar

To access this toolbar, select the View→Toolbars→Format menu option from the Report Designer main menu. This toolbar will assist in setting the font, colors and layering of components.

Property	Icon	Description
Font Name	N/A	Select the font name for textual components. Use TrueType fonts (indicated by a ⊤ icon) when possible. These render well on both the screen and printer. If you are using a dot-matrix printer, the print driver may supply printer fonts (indicated 🖨 by a icon) which you can use to speed up the printing of the report. Finally fonts that have no icon to the left of the font name are screen fonts, and should not be used in reports where WYSIWYG is required.
Font Size	N/A	Select the font size. You can also type in this box to set the font size exactly.
Bold	**B**	Set the font to bold.
Italic	*I*	Set font to italic.
Underline	U	Set font to underline.
Left Justify	≣	Left justify the text in the component.
Center	≣	Center the text in the component.
Right Justify	≣	Right justify the text in the component.
Font Color	A	Set the font color.
Highlight Color	✎	Set the background color of the textual component.
Bring to Front	🔲	Bring the component to the front. The components in the front print last, the components in the back print first. Use the Report Tree to see the exact layering of components within the band.

Sent to Back	🔳	Send the component to the back. The components in the front print last, the components in the back print first. Use the Report Tree to see the exact layering of components within the band.

Align or Space Toolbar

Align or Space ☒

⊫ ⊲⊪ ⊐⊩ │ ⊓ ⊥ ⊔ │ □□□ ⊟ │ ⊞ ⊟

To access this toolbar, select the View→Toolbars→Align or Space menu option from the Report Designer main menu. This toolbar will assist in positioning components relative to one another and relative to the band in which they appear.

Action	Icon	Description
Align Left Edges	⊫	Used to align a group of components with the leftmost position of the component that was selected first.
Align Horizontal Centers	⊞	Used to center a group of components based on the horizontal center of the component that was first selected.
Align Right Edges	⊐⊩	Used to align a group of components with the rightmost position of the component that was selected first.
Align Top Edges	⊓	Used to align a group of components with the topmost position of the component that was selected first.
Align Vertical Centers	⊟	Used to align a group of components based the vertical center of the component which was first selected.
Align Bottom Edges	⊔	Used to align a group of components with the bottommost position of the component that was selected first.
Space Horizontally	□□□	Used to space a set of components based on the leftmost position of the first component selected and the rightmost

		position of the last component selected.
Space Vertically		Used to space a set of components based on the topmostposition of the first component selected and the bottommost position of the last component selected.
Center Horizontally in Band		Used to center a component horizontally within a band.
Center Vertically in Band		Used to center a component vertically within a band.

Size Toolbar

To access this toolbar, select the View→Toolbars→Size menu option from the Report Designer main menu.

Action	Icon	Description
Shrink Width		Determines the minimum width of all the selected components, and then sets the width of the components to that value.
Grow Width		Determines the maximum width of all the selected components, and then sets the width of the components to that value.
Shrink Height		Determines the minimum height of all the selected components, and then sets the height of the components to that value.
Grow Height		Determines the maximum height of all the selected components, and then sets the height of the components to that value.

Nudge Toolbar

To access this toolbar, select the View→Toolbars→Size menu option from the Report Designer main menu.

Action	Icon	Description
Nudge Up		Moves all selected components one pixel up.
Nudge Down		Moves all selected components one pixel down.
Nudge Left		Moves the selected component one pixel to the left.
Nudge Right		Moves the selected components one pixel to the right.

Draw Toolbar

To access this toolbar, select the View→Toolbars→Draw menu option from the Report Designer main menu. This toolbar will assist in setting the colors and borders of components.

Action	Icon	Description
Fill Color		For shapes, lines and region components only. Sets the brush color property. To set the color of a textual component, check the Highlight Color action of the Format toolbar.
Line Color		For shapes, lines and region components only. Sets the pen color property.
Line Thickness		For use with a Line component only, sets the Weight property.

Line Style		For use with a Line component only, sets the pen style property.

Drag and Drop Support

ReportBuilder contains a Report Wizard that allows you to quickly create an entire report layout. This is great for generating an entire report, but what if you need to create only a portion of a complex report? Drag and drop functionality is an ideal solution for this problem because it allows you to create a set of components within the context of an existing report layout.

In ReportBuilder, drag and drop support is provided via the Data Tree (pictured below)

Data Tree - Data tab

The Data Tree has two tabs. In the top tree view, the 'Data' tab contains a list of data pipelines to which the report has access. In the bottom list view, all of the fields for the currently selected data pipeline are displayed. Fields can be selected from the bottom list view and dragged to any part of the report layout. The data-aware component, which is appropriate for the given field, will then be created along with a label and border.
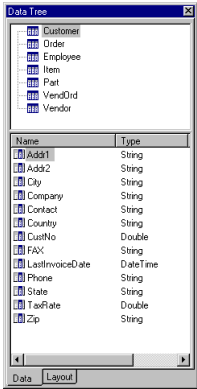
Data Tree - Layout tab

The second tab of the Data Tree is entitled Layout. This tab allows you to control the behavior of drag-and-drop. By default a label and border are created for each data-aware component. You can turn the label off, the border off, control the color of the label or border and control the font of the label and data-aware component from this tab. Once you've set the drag-and-drop behavior it is retained for future design sessions.
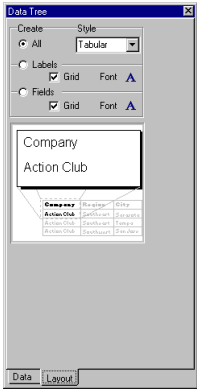
The Report Wizard

The Report Wizard can be accessed via the File→New menu option of the report designer. A series of screens are presented. Each requests information about the report. When the last page is reached, either a preview or design option can be selected. Clicking the 'Finish' button causes a report to be created and displayed as requested.

Your First Report

If you are already familiar with reporting and the process of creating a report, then this should be simple for you. If you have never created a functional report, it might seem like another language to you, but with a few practice reports under your belt, you should be creating reports like a pro. This chapter will attempt to simplify the process of creating a new report, and define terms used in reporting.

Starting with a Clean Slate

To explain the reporting basics, we will be creating a new report that will prompt for a date range and show all cases that were added to Prevail and the referral source. Select the folder called 'Lists,' and click the ⬜ button to bring up a blank report template. By selecting the 'Lists' folder before clicking the new report button, we have chosen to create our new report in the 'Lists' folder. You can always move the report to another folder by dragging it into another folder.

Building a report with the Prevail Reporter is a three-step process. Let's begin.

Step 1: Select Data

Before we do anything, we must know exactly what our report's goal is. For this example, we want to create a report that will:

    A. Prompt for a date range

    B. Show all cases added to Prevail within that date range

    C. Show each case's referral source.

By simply knowing what the report will do, we know which data we will need to include in the report. Since the report is basically a case list, we will be using the Clients table, *pvclient*, as our master table and the Referral Source table, *pvrefsrc*, as our detail table.

On the Prevail Report Designer, click the 'Data' tab. This is where we will define the data that will be used in the report. Select File→New from the main menu, select 'Query Wizard', and click the 'OK' button. The 'Query Wizard' window will appear. This wizard will help guide us through the data selection. From the 'Available Tables' list, select 'Clients' and click the right arrow button to move the table over to the 'Selected Tables' list. Since our detail table will be the 'Referral Source' table, select it and click the right arrow button.

When you click the right arrow button, a window called 'Join Table' will appear. This is where we define the relationship between these two tables. A list of possible relationships will be displayed in the 'Joined Fields' list. Some of these joins are not necessary for this report and may be removed. Remove all joins from

the list except 'Referral Source.Referral Source = Clients.Referral Source'. This is the relationship we want to use to connect these two tables. Click the 'OK' button to establish the join and continue. Click the 'Next' button.

The next step is to select the fields we want to use in our report. For this example, we are just going to select all fields. Select 'All Fields' and click the 'Next' button. We do not want to add any numeric calculations, so select 'No Calculations' and click the 'Next' button.

If we wanted to group our report by referral source, we could do that at this step, but for this example, we do not, so select 'No Grouping' and click the 'Next' button.

This is the step where we define the date range that will limit the resulting set. Select 'Define Search Criteria,' right click on the white box, and choose 'Insert Criteria.' Since we will want to show all cases that were added to Prevail within a date range, we want to limit by the Intake Date. Select 'Clients.Intake Date' from the 'Field' list, choose 'Between' as the 'Operator', and click the 'OK' button. By leaving the 'Value' field blank, we have told the Reporter to show an input dialog window when we run the report. If you were creating a report that would run in a batch, you do not want to show any prompts because that would hang up the batch process, so you would enter a value into the field. Click the 'Next' button to set the order.

We want to sort our report by the client's last and first name, so select 'Set Order' and add 'Clients.Last Name' and 'Clients.First Name' to the 'Selected Fields' list. Click the 'Next' button.

If you wish to give the data set a description name, do so by entering it in the 'Description' field. Click the 'Finish' button. A sample resulting set will be displayed. Click the 'OK' button to close it.

Step 2: Designing the Layout

Now that we have a data set to work with, we need to create the layout for the report. The layout is the visual organization for the data we have selected. Click the 'Design' tab. There are five basic parts to a report's layout. These are called 'Bands.'

1. Title – used to display the title of the report.

2. Header – appears at the top of each page and usually contains the column headers.

3. Detail – the detail is where the data usually is displayed. The 'detail band' is repeated until the end of a page, or all of the data has been displayed.

4. Footer – appears at the bottom of each page and usually contains page number or report totals.

5. Summary – used to show a summary of the report, usually by column totals

Creating a layout is pretty simple. For this report, we will primarily be using 'Labels' (**A**) which allow us to type in static text such as a report title or column heading, and 'DBText' (**A**) which is used to show data from the data set.

Click the **A** button, then click anywhere on the Header band. This will be the title of the report. Under the **A** button there is a field to type the text to be used for that label. In that field, type 'New Cases and Referral Sources.' You can change the font properties, as you desire. Position the title label by dragging it.

Using the same method, place labels for the following fields on the Header band.

1. Case #

2. Last Name

3. First Name

4. Intake Date

5. Referral Type

6. Referral Contact

Next, we need to add the actual data fields. Click the **A** button, then click anywhere on the Detail band. Under the **A** button, you will see a drop down box. Select 'Case Number – User Assigned' from the drop down box. Notice that the text of the 'DBText' has changed to the current value of the record in the data set. Position the 'DBText' by dragging it. Place it under the column header we made above. Do the same for fields 2 – 6.

> **Shortcut! Report Wizard**
>
> The Report Designer also allows for an extremely simple way to create layouts using the Report Wizard. Choose File→New, select 'Report Wizard', and click the 'Ok' button. Select the fields to be displayed in the report, set the order, then click the 'Finish' button to preview the design.

After you have added all of the fields, select File→Save, set the 'Name' field to 'New Cases and Referral Sources', and click the 'OK' button. Next, a Report Properties window will appear. Fill in the 'Description' of the report, and click the 'Save' button.

If you move your mouse over each button, a hint will appear displaying what the button will do. This is helpful when first learning how an interface works. This is a good time to experiment with all of the controls and options available to you. There are a lot of toolbars that do not show by default. Choose View→Toolbars and select a toolbar that you wish to see.

Step 3: Generating the Report

Click on the 'Preview' tab to see how the report looks when populated with data. This is the only thing you have to do to complete this step. The report engine handles the generation of the report. Now you can adjust the report to look exactly as you wish. Click back on the 'Design' tab and make your adjustments. Be sure to save the report when you are finished.

Advanced Topics

Like any software package, there are a few features that are quite powerful, but generally left out of the usual introductions and tutorials because of the depth of knowledge needed to discuss the features. If you have not yet mastered the process of creating a simple report, then the topics contained in this chapter may be out of your reach. Before continuing, be sure you have a solid grasp on the concepts mentioned earlier in this manual.

Adding Calculations to Reports

Calculations are commonplace in reporting. Usually, some kind of calculation is used in every report, whether it is counting records, adding currency, or concatenating two or more words, such as a last name and first name. Some calculations are handled at the query step, and others are handle at the design (layout) step.

If you would like to concatenate a first name and last name so you only have to use one field for a person's name, you would do that at the query design step. Open the Report Designer and click the 'Data' tab. If you have already added a query, click the 🖩 button to open the Query Designer. Double click either the first name or last name field to move it to the 'Calculations' list. Change the 'Function' to 'Expression' by choosing it from the drop down box. In the expression field, enter the following text, replacing 'First' and 'Last' with the actual field names.

RTRIM(Last) + ', ' + RTRIM(First)

> **N O T E**
>
> RTRIM is a SQL function that will remove all trailing spaces from the value of 'Last' and 'First'.

Other types of calculations can be performed at the design step by utilizing a DBCalc component (🖩). Such a calculation would be summing cost or fee totals. Simply place a DBCalc component on the Detail, Group Detail, Group Footer, or Footer band and set the field value to the field that you want to total. Right click on the DBCalc component, choose 'Calculations', and choose the calculation type from the 'Calc Type' drop down box. If the calculation is part of a group and should be reset, then choose the group from the 'Reset Group' drop down box. See the 'Simple Costs' report for an example of how to use a DBCalc component in this situation.

Drill-Down Sub Reports

A drill-down sub report adds a neat level of interactivity to a report. Drill-downs allow the report to show or hide a sub report by clicking on a component already on the report. Since drill-down reports aren't very practical for most cases, this manual will not go into detail about how to setup a drill-down report. For an example of a drill-down report, see 'Drill-down' found in the 'Examples' folder.

Groups

Grouping refers to organizing data by a particular value. Naturally, if you do not explicitly add groups, the Reporter treats each record as a group. For instance, if you have a Client report with First Name, Last Name, and Social Security number, the natural grouping would be all of the fields in the report.

For instance, if you want to create a report that displays each case and all of the cost entries for that particular case, you would want to group your report by case number or client name. By grouping on case number or client name, the report would "group" the case and cost entries together instead of listing each case with each cost entry.

Like calculations, you can set the grouping at the query design step or the layout design step. Setting the grouping at the layout design will give you more control over the output of the data set, rather than control over the data set itself.

To set a group at the layout design, choose Report→Groups from the Report Designer menu. In the 'Groups' drop down box, select the field to group the report. You can also choose to start a new page for each group, which is perfect for
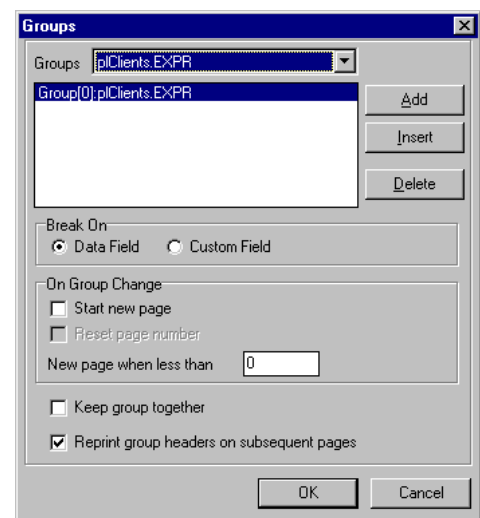
invoices. For an example of grouping, see the report called 'Simple Costs Due'.

Sub Reports

Most traditional reports, those that use only a few tables, are quite easy to create. When you start adding more information to a data set, the complexity of the report greatly increases. To help with organization, you can add sub reports to your report. A sub report is almost the exact same thing as a normal report. The layout design is done as you would a normal report. The only difference is that a sub report is nested into the main report.

Here is a short example of how to use a sub report. Open a report in the Report Designer by selecting the report and clicking the ✎ button. Place a Sub report component (▤) on the Detail band. A tab will be created at the bottom of the 'Design' tab called 'SubReport1'. Select the 'SubReport1' tab, place a DBText component (**A**) on the Detail band, and set its field value to any available field. Click the 'Preview' tab to view the report with the sub report. Try playing around with the sub report to get an idea of how the Header, Detail, and Summary bands work within a sub report. The possibilities are endless.
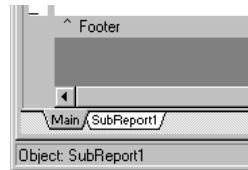
Tips and Tricks

This chapter contains some common report designing techniques, lesser-known features of the Prevail Reporter, and general tips for creating and maintaining functional reports.

Counting Records

With a few mouse clicks, you can add a running record count to your report. Select the report you wish to add a record count to and click the ✎ button to run the Report Designer. On the 'Design' tab, add a DBCalc (▦) component to the Detail band. Position the DBCalc component to as you wish and click the 'Preview' tab to check out your running record count.

Creating Batches

As stated earlier, one nice feature of folders is the ability to become a scheduled batch report. By selecting a folder and choosing File→Properties, you can enable the 'Scheduled Run' options of a folder. The batch can run every day at a specific time, any combination of days of week, or a particular day of the month. You can schedule those
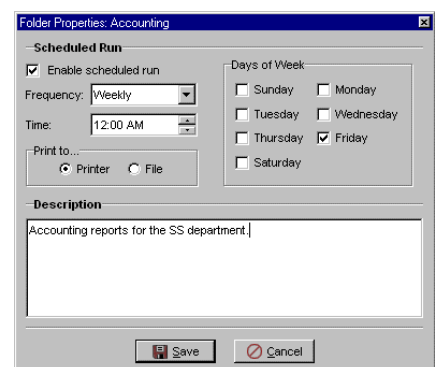
important morning reports to run before your firm even wakes in the morning.

There are a few issues you must be aware of before you start enabling batches. The most important issue is the scheduled time. If you plan on enabling more than one batch on a given day, you must make sure the scheduled times do not conflict. Depending on the number and complexity of the reports in a batch, the amount of time it takes to print the batch may increase and could possibly cause conflict in scheduled times. To alleviate this potential problem, print a folder by choosing File→Print Folder and see how long the folder takes to print. Note the time in the folder's description for reference. Note that as your firm continues to grow and the amount of data increases, the time it takes to run a particular batch may also increase.

The second issue involves attempting to avoid prompts in reports that will run as part of a batch. When the report asks for information and a user is not around to supply the information, the entire scheduling process is put on hold until the prompt is satisfied. This will cause scheduling conflicts and missed reports.

The final issue is quite elementary. The only way the scheduled batches can run is if the Prevail Reporter is running on at least one machine. It is generally not a good idea to run scheduled batches on more than one machine, unless you need to print the same reports to different printers in different parts of the firm. For instance, if the accounting department is located on a different floor than the attorneys, it might be a good idea to run the Reporter on one machine in both places so each department's needs are satisfied.

Form and Letter Emulation

If you create a lot of forms or letters, you may benefit from using the Prevail Reporter to generate them. Since you have the ability to limit a dataset by criteria, you could automate all of your document creation by setting up forms in the Reporter. For instance, if your firm sends out Holiday cards to clients, you could setup a custom field in Prevail called 'Holiday Card' using the values 'Yes' and 'No' to denote whether the client will receive a card. When you create the letter, you would set the Search Criteria to show all records that have the value of 'Yes' in that particular custom field.

To create a form using the reporter, you could either manually replicate it by using shapes, lines, labels, and DBText (A) components. If you have access to a scanner, you could scan the form, and save the image as a WMF (Windows MetaFile). Remove the Header and Footer bands, stretch the Detail band to use the entire page height, place an image component (▨) on the Detail band, set the picture property to the WMF file, check the DirectDraw property, check the Stretch property, and arrange the image to fill the entire page. Finally, place DBText (A) components on top of the image to hold field values.

Before you decide to convert to using the Reporter for forms and letters, you must know that there is a drawback in using this method. Prevail will not track letters and documents created using the Reporter like it does when you merge a document within Prevail.

Importing Reports
There may be times when you will need to share reports among departments, branches, or even friends. Since the Prevail Reporter stores the reports in database tables, the reports have to be imported. If you have received a report file (*.RTM or *.PTR), choose File→Import Report, or type Ctrl+I. Find the report file and open it. If a report with the same name already exists in the table, you will be prompted to overwrite the report. If you choose not to overwrite the report, it will be renamed for you. The report will be imported into the currently selected folder. You can move the report after the fact by dragging it onto another folder.

Printing Folders
There are times when you will need to run more than one report at a time. For instance, if your firm does end-of-the-month accounting reports, the probability that there is more than one report to cover all accounting needs are high. Not only can you print a report, you can also print an entire folder. To do this, select the folder to be printed and choose File→Print Folder from the main menu. If your reports prompt you for information necessary to run the report, be sure you are ready and available to enter information when needed. The reports will not complete until all prompts have been satisfied.

Printing Reports to File
Sometimes firms are required to send copies of reports to other agencies. Sending hard copies by mail or FAX machine are not always viable options. If the report is needed immediately, the best way to get a report to another person is to print the report to a file and send it as an e-mail attachment.

The Prevail Reporter is capable of printing to a number of file types. To do this, preview a report and click the ⬛ button, or choose File→Print from the main menu. Check the 'Print to File' option, choose a file type from the 'Type'
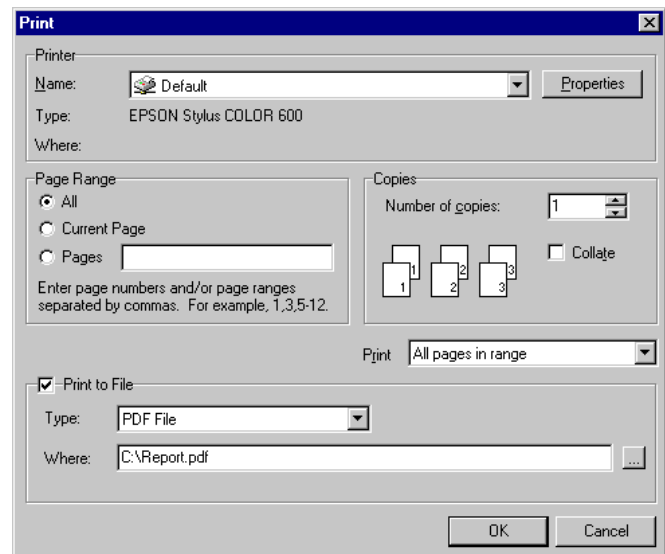
drop down menu, and give the file a name. The Prevail Reporter can print to Adobe Acrobat files (*.PDF), plain HTML, HTML with cascading style sheets, plain text, emulated text, Lotus, Quattro, Excel, Bitmap, JPEG, and Rich Text File (*.RTF). The best option is the Adobe Acrobat type. However, the receiving party must have the full version of Adobe Acrobat, or the free Acrobat Reader application installed to view it.

Refreshing Folders and Reports

If more than one person in your firm is responsible for creating and maintaining reports, there may be times when you need to use the refresh button ( ). The refresh button will refresh the report tables and reload folders. If one person creates a report while other people are using the Reporter, you will need to refresh the reports to see the report that was created. To refresh reports, click the   button.

Report Wizard

The Report Wizard may be the single most advantageous feature the Report Designer has to offer. When you need a quick report, you don't always have time to sit down and design the layout for the report. It takes time to perfect a report's layout, and when time is of the essence, you can't afford to waste it dragging objects around on a screen. Instead of manually designing the layout of a report, on the 'Design' tab, choose File→New from the main menu. Select 'Report Wizard' and click the 'Ok' button. Take the time to step through the wizard.
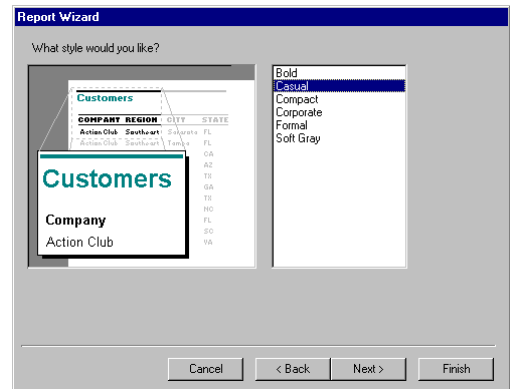
Saving a Report as a File

If you need to exchange reports between offices, saving a report as a file allows you to send the report to another location. When the other location receives the report, all they have to do is import it. If you are creating a report, but the report is not turning out like you want it to, you can save the report as a file and send it to PTI for help.

To save a report as a file, select the report, choose File→Save to File, give the file a name, and click the 'Save' button. The file will be saved with the .RTM extension.

Using Reports from PTI

Firms often request us to create reports for them, or download reports available from our website (http://www.prevail.net). Since the Prevail Reporter stores all of

the reports in database tables, the Prevail Reporter has to import the reports. This is a little different than past versions of the Reporter. In version 2.0, all that was necessary was copying the .PVR file into the Prevail\Reports directory then restarting the Reporter. This new version of the Reporter scans for report files from PTI when it starts. If there are reports that need to be added to the report tables, it does so automatically and displays the number of reports imported via the status bar.

When you receive a report from PTI, via e-mail or a website download, save the report file (*.PTR) to the local directory you are running the Prevail Reporter from (default is C:\Prevail\Reporter). If the Reporter is running, exit and restart the Reporter. The next time the Reporter starts, you will see a message on the status bar that says, "Imported X new report(s)." where X is the actual number of reports imported.

If a report with the same name already exists in the table, you will be prompted to overwrite the report. If you choose not to overwrite the report, it will be renamed for you.

Chapter

14

Reference

*A complete list of all keyboard commands, SQL functions,
and other bits of information*

Keyboard Shortcuts

Keystroke	Name	Description
F10	New Prospect	Create a new prospect
Ctrl-A	New Appointment	Schedule a new appointment from the main Prevail window
Ctrl-T	New To-Do	Create a new to-do from the main Prevail window
F12	Save	If in update mode, F12 will save changes
Ctrl-U	Update	Update client information on the main Prevail window
Ctrl-I	Import Text from File	If in update mode and the active field is a memo field, this will allow you to enter text from a file
Ctrl-P	Print	Print the current tab
Alt-F4	Exit	Exit Prevail
F2	Quick Search	Search for a client by last name
Ctrl-F2	Power Search	Search for cases, providers, attorneys, parties, etc.

Shift-F10	Closed Prospects	View closed prospects
Ctrl-F10	Open Prospects	View opened prospects
Ctrl-F9	Digital Photo	Capture or view photos for a case
F5	Forms	Create forms or letters
F4	Case Notes	Open case notes
F3	Rolodex	Open the rolodex
F8	Calendar	Open the calendar to the 'Appointments' tab
F11	Set Reviewed Date	Sets the current cases review date and user
Ctrl-F4	Sticky Note	Add or view a sticky note for the current case
F6	To-Dos	Open the calendar to the 'To-Dos' tab
F9	Case Summary	Opens the case summary window
Ctrl-1 - Ctrl-\	Change Tabs	Using Ctrl-1, Ctrl-2, Ctrl-3, etc will change the active tab.
Ctrl-F	Find	Find text in the Case Notes
Ctrl-R	Replace	Replace text in the Case Notes

Universal Shortcuts

The following keystrokes are available throughout Prevail.

Keystroke	Name	Description
Alt-U	Button Names	Any button that has a letter underlined in the button name, such as 'Update', can be accessed by pressing Alt-U, where U is the letter that is underlined
Esc	Cancel	Esc will cancel out of every window and discard changes

F12	Save	Save and close window
Ctrl-X	Cut	Deletes selected text and copies it to clipboard
Ctrl-C	Copy	Copy the selected text to the clipboard
Ctrl-V	Paste	Paste text from the clipboard
Ctrl-Del	Delete	Delete text
Shift-Ctrl-A	Select All	Selects all text in a field
Insert	Insert	Insert new items in the main Prevail window
Delete	Delete	Deletes selected items in the main Prevail window and Calendar

SQL Reference

SQL (Structured Query Language) is a standard interactive language for getting information from a database. Queries take the form of a command language that lets you select, insert, update, find out the location of data, and so forth. Most of the SQL used by Prevail deals with selecting data for reports or searches.

Aggregate Functions

An aggregate function applies to the results of a query rather than listing all of the records. For instance, the following SQL expression would result in one record with the number of records in the pvfees table.

SELECT COUNT(*) FROM pvfees

Function	Definition	Example
AVG(expr)	Calculates the average of a set of values	SELECT AVG(amount) FROM pvfees
COUNT(expr)	Returns the number of non-NULL column items that satisfy a query's search condition.	SELECT COUNT(lastname) FROM pvclient
COUNT(*)	Returns the number of records that satisfy a query's search condition.	SELECT COUNT(*) FROM pvclient

MAX(expr)	Returns the maximum value from a set of values.	SELECT MAX(amount) FROM pvcosts
MIN(expr)	Returns the minimum value from a set of values.	SELECT MIN(amount) FROM pvcosts
SUM(expr)	Total the values in a set of numeric values.	SELECT SUM(amount) FROM pvcosts

Math Functions

ABS(num)	Returns the absolute value of a numeric.	
ACOS(float)	Returns the arccosine of float as an angle, expressed in radians.	
ASIN(float)	Returns the arcsine of float as an angle, expressed in radians.	
ATAN(float)	Returns the arctangent of float as an angle, expressed in radians.	
ATAN2(float1, float2)	Returns the arctangent of the x and y coordinates, specified by float1 and float2, as an angle, expressed in radians.	
CEILING(num)	Returns the smallest integer greater than or equal to num.	
COS(float)	Returns the cosine of float, where float is an angle expressed in radians.	
COT(float)	Returns the cotangent of float, where float is an angle expressed in radians.	
DEGREES(num)	Returns the number of degrees converted from radians.	
EXP(float)	Returns the exponential value of float.	
FLOOR(num)	Returns the largest integer less than or equal to num.	
LOG(float)	Returns the natural logarithm of float.	
LOG10(float)	Returns the base 10 logarithm of float.	

MOD(int1, int2)	Returns the modulus (remainder) of int1 divided by int2.	
PI( )	Returns the value of pi as a floating-point value constant.	
POWER(num, int)	Returns the value of num raised to the power of int.	
RADIANS(num)	Returns the number of radians converted from degrees.	
RAND([int])	Returns a random floating point value using int as an optional seed value.	
ROUND(num, int)	Returns num rounded to int places to the right of the decimal point. If int is negative, num is rounded to ABS(int) places to the left of the decimal point.	ROUND(32.5254, 0) returns 33
SIGN(num)	If num is less than zero, –1 is returned. If num equals zero, 0 is returned. If num is greater than zero, 1 is returned.	
SIN(float)	Returns the sine of the float expression, where float is an angle expressed in radians.	
SQRT(float)	Returns the square root of float.	
TAN(float)	Returns the tangent of float, where float is an angle expressed in radians.	
TRUNCATE(num, int)	Returns num truncated to int places to the right of the decimal point. If int is negative, num is truncated to ABS(int) places to the left of the decimal point.	TRUNCATE(3245.334, 2) returns 3245.33

String Functions

ASCII(str)	Returns integer ASCII value for single character at start of str.	ASCII('A') returns 65
BIT_LENGTH(str)	Returns length of str in bits (assumes 8-bit characters)	BIT_LENGTH('Hello') returns 40
CHAR(int)	Returns a character value from ASCII integer	CHAR(65) returns 'A'

CHAR_LENGTH(str)	Returns the length of string in characters	CHAR_LENGTH('Hello') returns 5
CHARACTER_LENGTH(str)	Returns the length of string in characters	CHARACTER_LENGTH('Hello') returns 5
CONCAT(str1, str2)	Returns a string that is the result of concatenating str2 to str1	CONCAT('Hello ', 'World!') returns 'Hello World!'
INSERT(str1, start, len, str2)	Returns a string where str2 into str1 at position start for at most len characters, Replacing len characters	INSERT('SQL is fun!', 8, 0, 'not ') returns 'SQL is not fun!'
LCASE(str)	Returns string with all uppercase characters converted to lowercase	LCASE('SQL Is Fun!') returns 'sql is fun!'
LEFT(str, count)	Return the left part of string str up to count characters	LEFT('SQL is fun!', 3) returns 'SQL'
LENGTH(str)	Returns the number of characters in str, excluding trailing blanks	LENGTH('Testing') returns 7
LOCATE(str1, str2[, start])	Return integer location (1based) of str2 in str1, with optional start starting point. If str1 not found in str2, 0 is returned.	LOCATE('Hello World!', 'll') returns 3
LTRIM(str)	Returns string with leading spaces from left side of string	LTRIM(' This is a sentence.') returns 'This is a sentence.'
OCTET_LENGTH(str)	Returns length of string in octets (i.e. bytes)	OCTET_LENGTH('Hello') returns 5
POSITION(str1 IN str2)	Returns the position of str1 in str2	POSITION('Wo' IN 'Hello World') returns 7
REPEAT(str, cnt)	Returns a string consisting of str repeated up to cnt times	REPEAT('Fun ', 3) would return 'Fun Fun Fun '

REPLACE(str1, str2, str3)	Replace all occurrences of str2 in str1 with str3	REPLACE('This is fun!', 'is', 'IS') would return 'ThIS IS fun!'
RIGHT(str, count)	Returns a string of count characters of right part of str	RIGHT('Hello World', 3) would return 'rld'
RTRIM(str)	Returns a string with trailing spaces removed from right side of string	RTRIM('Brown ') would return 'Brown'
SPACE(count)	Returns a string of space repeated up to count times	SPACE(4) returns ' '
SUBSTRING(str, pos, len)	Returns a portion of str starting at pos, up to length len	SUBSTRING('SQL is fun!', 5, 2) returns 'is'
UCASE(str)	Returns a string with all lowercase characters converted to uppercase	UCASE('Hello World!') returns 'HELLO WORLD!'
UPPER(str)	Returns a string with all lowercase characters converted to uppercase	UCASE('Hello World!') returns 'HELLO WORLD!'

Date and Time Functions

CURDATE( )	Returns DATE for current date with 1-based month	CURDATE() returns the current date in 'mm/dd/yyyy' format
CURRENT_DATE()	Same as CURDATE	CURRENT_DATE() returns the current date in 'mm/dd/yyyy' format
CURRENT_TIME([precision])	Same as CURTIME with optional precision seconds	CURRENT_TIME() returns the time in 'hh:mm:ss AM/PM' format
CURRENT_TIMESTAMP([precision])	Returns TIMESTAMP for current local time, with optional precision seconds	CURRENT_TIMESTAMP() returns the time in 'hh:mm:hh AM/PM' format
CURTIME()	Returns TIME for current local time, with optional precision	CURTIME() returns the time in 'hh:mm:hh AM/PM' format

	seconds.	
DAYNAME(date)	Returns weekday name string from CHAR|DATE|TIMESTAMP	DAYNAME(CURDATE()) returns day name, such as 'Tuesday'
DAYOFMONTH(date)	Returns integer day of month (1-based) from CHAR|DATE|TIMESTAMP	DAYOFMONTH(CURDATE()) returns the day of the month, such as 7

Chapter

15

Troubleshooting

Troubleshooting the Prevail system

Opening Prevail

Access Violation after Loading

This will occur if the "Machine is on Network" option is checked in the Prevail Settings and TCP/IP is not loaded as a network protocol. Prevail attempts to get an IP address from the system to use for chatting and system-wide message broadcasting. The error usually happens after all of the Prevail files have been loaded just before the main window appears.

Uncheck the "Machine is on Network" option in the Prevail Settings, or load the TCP/IP protocol.

Could not find Prevail directory

This happens when there is a problem with the drive mapping. First, check to see that there actually is a drive mapped to whatever is specified in Prevail Settings. Windows '95 sometimes arbitrarily removes drive mappings, and they simply need to be re-connected.

If there is a drive mapped, look very closely at the Prevail Settings and make sure the path is correct and there are no extra characters.

If the Network Path is a drive letter such as P:\ instead of a path like P:\Prevail, the drive has probably been mapped to the Prevail directory instead of the root of the hard drive. In this case, you need to use the UNC naming convention.

Change the Network Path to: \\server\drive share\prevail

Where "server" is the name of the server machine and "drive share" is the share name of the drive.

Error 7008
Conflicting server options causes this error. If one machine is using the 'Local' setting in Prevail, and another is using the 'Remote' setting, make sure all machines are using 'Remote' (if ADS is installed) or 'Local'.

If the Prevail Control Panel is re-indexing or packing the database, attempting to run Prevail will result in this error message. Wait until the reindex or pack completes before running Prevail.

Error opening database – PVUSERS
Make sure the drive mapped for Prevail is not mapped root. If it is mapped root/mapped directly to the network Prevail directory, Prevail will not load. Remove that mapping and map a drive letter to the proper share.

You may also use the UNC location of the Prevail directory in the Settings file.

Error opening database – XXXX
This could be caused by a number of issues. Try the following steps.

1. Check the Prevail Path by running the Prevail Settings. Make sure it is pointing to the correct set of data, and the mapped drive is valid.

2. Make sure the client application is the correct version for the server installation.

3. If you are using the Advantage Database Server, make sure you have the correct server mode set.

4. Pack the database and Reindex.

There could be the possibility of corrupted data. Call PTI.

Prevail did not exit correctly
There is a setting that tells whether or not Prevail is running. If Prevail ungracefully exited, you will get this notification. This is just for you to know that you either exited Prevail wrong, or something happened that forced Prevail to fail.

Running Prevail

7038 Error
This error is often indicative of corrupted indexes.

Have everyone exit Prevail, run the Prevail Control Panel, and click the Reindex button.

Clients not sorted

A corrupted index file causes this error. Run the Prevail Control Panel and click the 'Reindex' button. Make sure all users are logged out of Prevail.

Custom field labels disappeared

More than likely, they haven't actually disappeared. Prevail 3.9.2 introduces separate custom field label sets for Social Security and Personal Injury. Choose Data Bank→Social Security→Custom Field Labels. If your old labels show up, all you need to do is retype the labels into Personal Injury custom field labels by choosing Data Bank→Personal Injury→Custom Field Labels.

Failed to save stream

This error occurs when saving a record after an update. First, make sure there is plenty of free hard drive space on the server.

This error can also be caused by table/record corruption. Call PTI for a solution.

Local Connect Failed

This is usually caused by a lack of resources allocated to the Advantage Local Server (ALS, or local database engine). This problem has not been reported by anyone using the Advantage Database Server (ADS).

A solution to this problem is to allocate more resources to the ALS. To do this, open the file called "adslocal.cfg" found in the C:\Windows\System directory for Windows 95/98 and in C:\Winnt\System32 for Windows NT users. Make sure the following settings are correct. If the user still experiences these errors, try increasing the numbers by 10.

CONNECTIONS=20
TABLES=70
INDEXES=100
LOCKS=750

The file with the correct settings can be downloaded from http://www.prevail.net/files/adslocal.cfg. Save the file in the C:\Windows\System directory for Windows 95/98 users and in the C:\Winnt\System32 directory for Windows NT users.

OE Exception on Costs/Time Tab

If the "Local Connect Failed" message does not appear before the blue screen "OE Exception" error, then this is normally caused because a cost or time entry has a blank date.

The solution to this problem is to make sure all cost and time entries have a date. To fix old entries, download and run the CTFix.exe program from the website at http://www.previal.net/usersonly/files/ctfix.exe.

Out of memory

This error might occur when updating or activating a client. First, make sure there is plenty of free hard drive space on the server.

It can also be caused by table corruption of some sort. Call PTI for a solution.

RichEdit Line Insertion Error

More than likely, the machine this happens on is a Windows 95/98 machine. The reason this error occurs is the Case Notes file has reached the maximum size limit. Export the notes by clicking the "Export" button.

Windows 95/98 enforces a 32KB or 64KB resource limit on RichEdit memo fields. Windows NT allows for unlimited size.

Slow Prevail performance

If you are running any virus scanners, turn them off. Most virus scanners have options to scan files when they are opened. If this is the case, it may take Prevail up to 15 minutes to open, because the scanner is scanning large files across a network.

If you have not packed the database in a while, do so. This will help speed up the startup and general performance. Use the Control Panel to clean old calendar appointments and to-dos.

If you are still experiencing slow performance and more than ten people are using Prevail at the same time, you may want to consider purchasing the Advantage Database Server. This will make Prevail a true Client/Server environment, reducing network traffic and the number of files that are opened on each workstation.

Check your hardware. Prevail requires a Pentium 166 and 32 MB RAM for minimal performance. If you are accustomed to fast performance with a number of applications opened at the same time, then consider upgrading to atleast a Pentium 233 with 64 MB RAM or better.

Strange appointments behavior

Check to make sure that the appointments are actually for the user that is currently selected and you are on the correct day in the calendar.

Sometimes the appointment index (PVAPPT.ADI) gets damaged. Reindex the database and Prevail will accept appointments. It will not, however, bring back appointments that were added during the time it was damaged.

Merging Documents

Case manager initials incorrect
If the case manager initials at the end of a document (ATT/cmn) are incorrect, open the document for editing and make sure the field code for the initials is 225 and not 226. Field code 226 is the user's initials not the case manager's initials and will not appear lowercased, as they should. Field code 225 is the case manager's initials and will appear lowercased.

Class not registered
WordPerfect was installed without the OLE components. If WordPerfect was installed using the Compact install type, these will not be included. Reinstall WordPerfect using the Typical Install or go to Custom Install and add the OLE Components.

This error can also occur if WordPerfect has lost its OLE registration. Corel is aware of this problem and includes a program called pfreg.exe found in the Corel\SuiteX\Programs directory. Run this program and un-register the components, then re-register the components.

Drive not available
This error is caused by a default setting in WordPerfect. Choose Tools→Settings from the main menu of WordPerfect, and double click the Files icon. On the Document tab, there is a setting called "Default document folder". If this path does not exist, it will give an error message after the merge has completed (when it tries to save the document).

Error creating secondary file
Make sure you have the latest fresdict.adt file. Check the Prevail Network at http://www.prevail.net for an update for this file.

Error in MSVCRT.DLL
This only happens when running WordPerfect 8 or better. This is caused by a version conflict with the MSVCRT.DLL. Copy the DLL from your WordPerfect CD to your C:\Windows\System directory.

Error opening data files
This error is usually followed by an "Error creating secondary merge file" error. This sequence of errors is caused by a corrupted database. Check pronouns.adt,

pvsystem.adt, or fresdict.adt. This will usually cause a lock on the c:\prevail\fresno.sf file that will need to be deleted.

Invalid class string

You are attempting to merge a document before a previous merge has completed. Wait until the merge has completed before attempting to merge another.

WordPerfect installed without OLE class registration generally causes this. Reinstall WordPerfect and make sure you do a full installation. The default installation should work fine. If running WordPerfect 6.1 or lower, upgrade to 8.x or better.

{Private} field in document

When Microsoft Word converts a WordPerfect form into its format, it will place {private} for any field it does not have an equivalent for. It will only show the {Private} text if hidden text is turned on. To turn off the hidden text choose Tools→Options from the main menu. On the 'View' tab, uncheck 'Hidden Text' or 'All'. If the field is printing, check the Print tab in Options and uncheck the hidden text option.

Template document not found

This error occurs when the document you are attempting to merge cannot be found. Check the letter's file name by choosing Tools→Forms→Letters, select the letter, and click the 'Edit' button. Make sure the filename is exactly the same as the actual letter. The most common cause is the word processor appending '.doc' or '.wpd' to the file name when it is saved.

Too many/too few fields

This is the result of the file, Header.doc in the local C:\Prevail directory, not matching the actual number of fields created in the secondary merge file. There are two files in the C:\Prevail directory called Header.doc and Header00.doc. If you are using Microsoft Word 95 or 2000, rename the file Header00.doc to Header.doc. If using Word 97, use the Header.doc.

Word processor freezes

This could be a number of things. First, make sure you have enough available system resources to have Prevail and the word processor opened at the same time. Also, if running a network install of the word processor, try installing it local to each machine. Check the manufacturer for updates or service packs.