PREVAIL 5

Learning to Use the Prevail Case Management System

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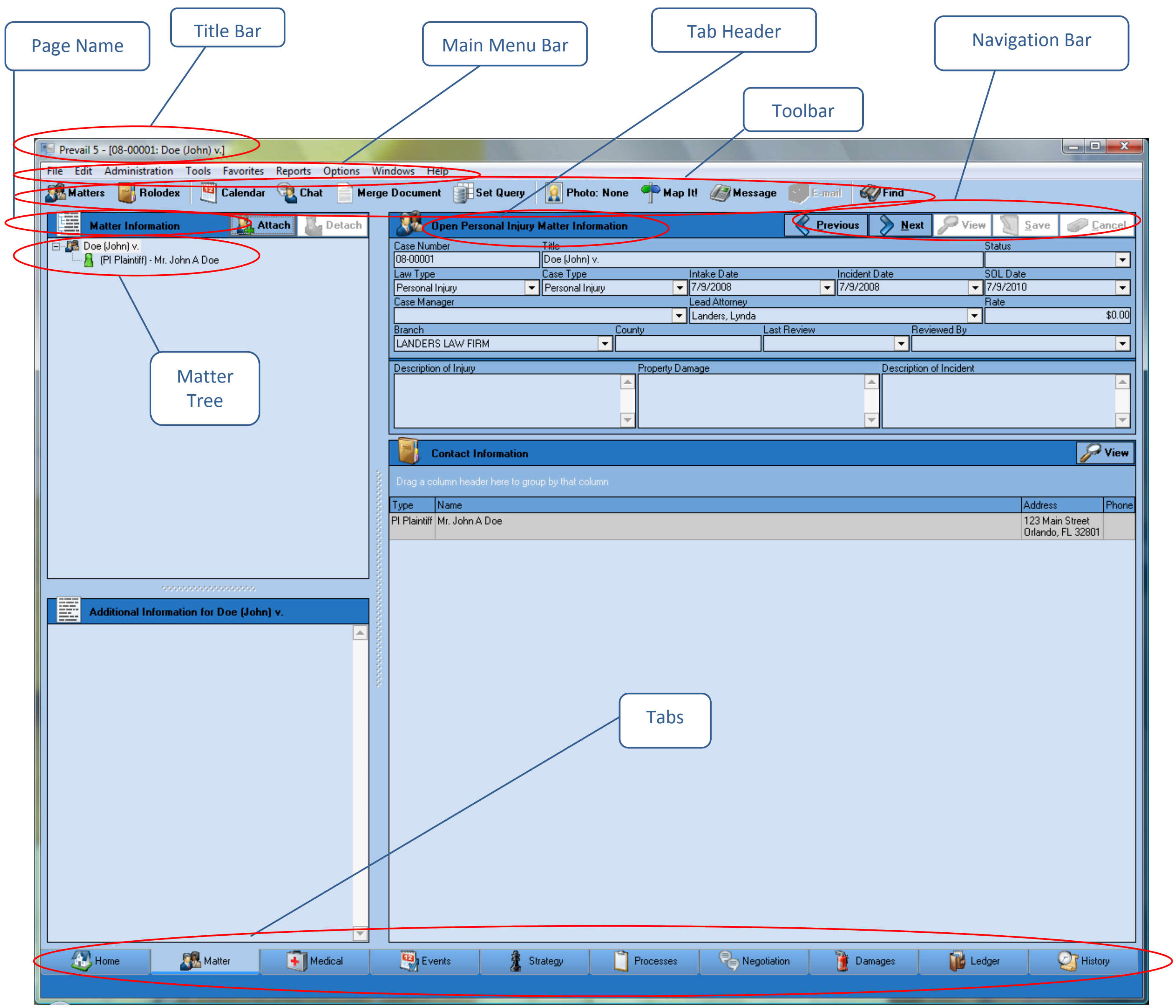
Chapter One: The Interface

Prevail is known for its simple point and click user interface. Although Prevail Version 5 looks different, the feel and ease of use remain the same. The interface is better organized, and important conformity features, keyboard equivalents, new menus, and new buttons have been added

Main Matter Screen

Refer to the diagram below and the table on the next page to understand the seven parts of the interface.



Chapter Two: Initial Setup

The Rolodex is the backbone of the Prevail system. Plaintiffs, claimants, defendants, medical providers, insurance companies, government agencies, opposing counsel, referral sources, and any other contacts you can think of all reside in the Rolodex. Each unique party has only one entry in your Rolodex. Then, you can attach each of these parties to as many matters as you like, in whatever role the situation requires.

In later chapters, you'll learn how to add parties to the Rolodex and attach them to the matters, but your first task is setting up your own firm's Rolodex entry.

Adding Your Firm to the Rolodex

The very first Rolodex entry you'll need to enter is for your own firm. Prevail pulls the information for your merge documents from your firm's Rolodex entry.

*Note: If your firm has more than one office, repeat the following steps for *each* office.

Follow these steps to add your office to your Rolodex if your firm.

Step	Task
1	Click on 'Rolodex' on the toolbar.
2	Change the 'Search Type' to "Any Part of Rolodex Title".
3	Type ABC in the 'Search Criteria' field. A list of matching Rolodex entries appears.
4	Double-click on the Rolodex entry for "ABC Law Firm, P.C.".
5	Select 'Branch Office' from the 'Type' drop-down list.
6	Enter the name of your firm in the 'Office/Company/Firm' field.
7	Tab to the 'Address' field, and enter your firm's address. *Note: If your firm has a suite number, you may enter the suite number on the first address line with the street address, or you may use the second address line for the suite number. Just be sure to set a standard that will be used by *everyone* in your office.
8	After entering your street address, press the <Tab> key, and you will skip over the city and state fields directly to the zip code field.
9	Enter your five-digit zip code in the zip code field. The city and state fields will automatically populate after you enter your zip code.

Adding Your Firm to the Rolodex *(continued)*

Step	Task
10	Press the <Tab> key once, and Prevail takes you to the city field. • If the city name is correct, press the <Tab> key without making any changes. Prevail moves you to the state field. • If the city name is incorrect, type the first letter of the correct city name, and the name of the correct city will appear. Press <Enter> when the correct city name displays. Then, press the <Tab> key to move to the state field.
11	Press the <Tab> key to move from the state field to the phone number field and enter your firm's phone number, using numbers only (no dashes or other characters are needed).
12	Press the <Tab> key to move to the 'Fax' field, and enter your firm's fax number, using numbers only.
13	Click 'Save'.

Adding Other Branch Locations of Your Firm to the Rolodex

Although your firm (like any other party) should only have one entry in your Rolodex, you will need to set up an individual entry for each branch office (physical location) of your firm.

If your firm has only one location, you may skip this procedure!

Follow these steps to set up individual Rolodex entries for each of your firm's branch offices.

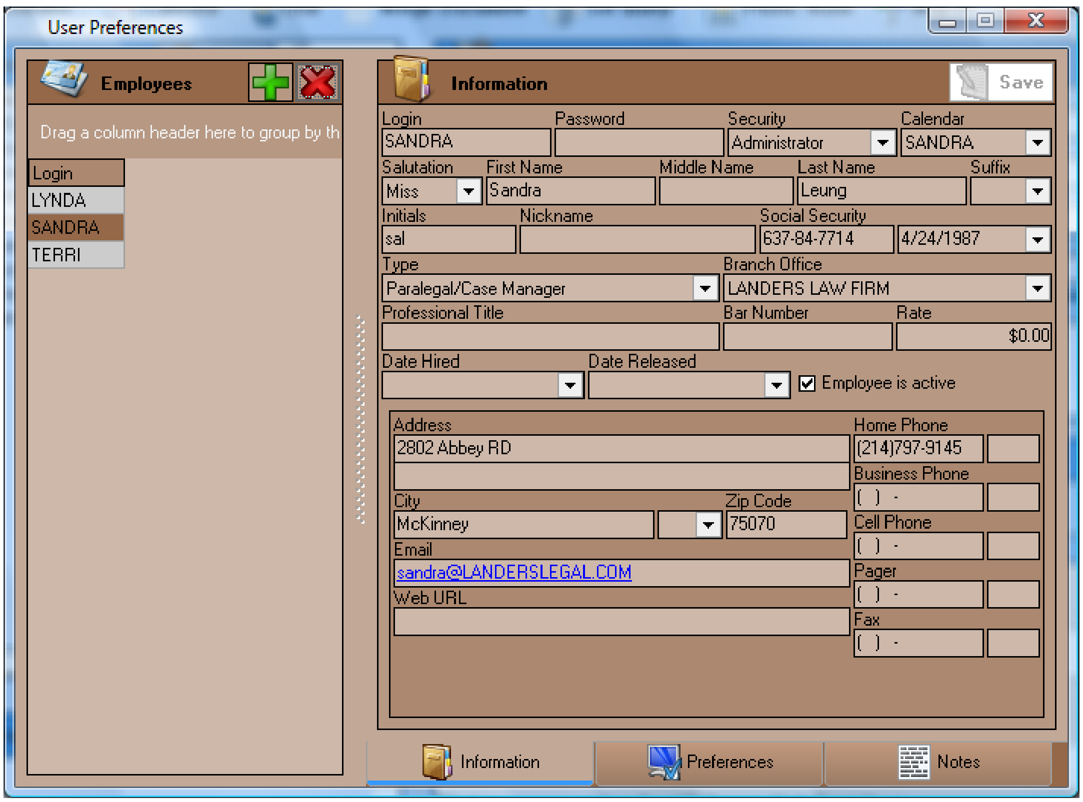
Step	Task
1	Click on 'Rolodex' on the toolbar.
2	Change the 'Search Type' to "Any Part of Rolodex Title".
3	Type any character string from your firm's name in the 'Search Criteria' field. A list of matching Rolodex entries appears.
4	Double-click on the Rolodex entry for your firm. The Rolodex entry for your firm appears.
5	Click the 'Clone' button at the top of the Rolodex entry window.
6	Delete the word "[CLONED]" from the firm name in the 'Office/Company/Firm' field, and give this branch office a *unique* name (different from the name you gave to your other branch office). For example, you might designate this office as "Downtown Office".

Adding Other Branch Locations of Your Firm to the Rolodex *(continued)*

Step	Task
7	Repeat steps 7-13 from the *Adding Your Firm to the Rolodex* procedure above to finish setting up the Rolodex entry for this branch office.

Setting Up User Accounts

*Note: Only users with an "Administrator" security setting in Prevail may add, delete, or modify user accounts.



Follow these steps to set up a Prevail user account.

*NOTE: You must have an 'Administrator' security setting in Prevail in order to add, edit, or delete user accounts.

Step	Task
1	Click on 'Administration' from the main menu, and then select 'Employees'. A User Preferences window will appear.
2	Click the '+' button at the top of the User Preferences window.

Setting Up User Accounts *(continued)*

Step	Task
3	Enter a login name for the employee. *Note: Prevail defaults to all caps for user names, regardless of how you input them.
4	If desired, enter a password for the account. If you do not want a password for the account, you may leave this field blank.
5	Select a 'Security' level for the user. The most commonly used security levels are • Administrator (full privileges on Prevail) or • Power User (all privileges except for access to the Administration menu and functions).
6	Complete the following fields, as applicable: • Salutation • First name • Middle name • Last name • Suffix • Initials (used when generating merge documents) *Note: You may choose to complete the remaining fields in this window (e.g., nickname, Social Security number, birth date), but many of our clients choose not to include this personal information.
7	Choose an employee type from the 'Type' drop-down list. *Note: You must choose a type that contains that phrase "Case Manager" for any employees who fill this role in any matters, and you must choose a type that contains the word "Attorney" for any employees who fill this role in any matters. These rules are due to the way Prevail pulls information for merge documents. For this reason, it is helpful to select the type "Attorney/Case Manager" for <u>all</u> employees who serve as the attorney or case manager in any matters.
8	Choose the appropriate office location from the 'Branch Office' drop-down list. *Note: If your office has a single location, your office name is the default, and you won't need to change it.
9	Complete the 'Professional Title' field with any professional designations (e.g., Esquire, Attorney at Law, PhD) that are relevant for the user.
10	Complete the remaining fields on the tab, as desired.
11	Click 'Save'.
12	Repeat steps 2-12 for each user account that you need to add.

Deleting User Accounts

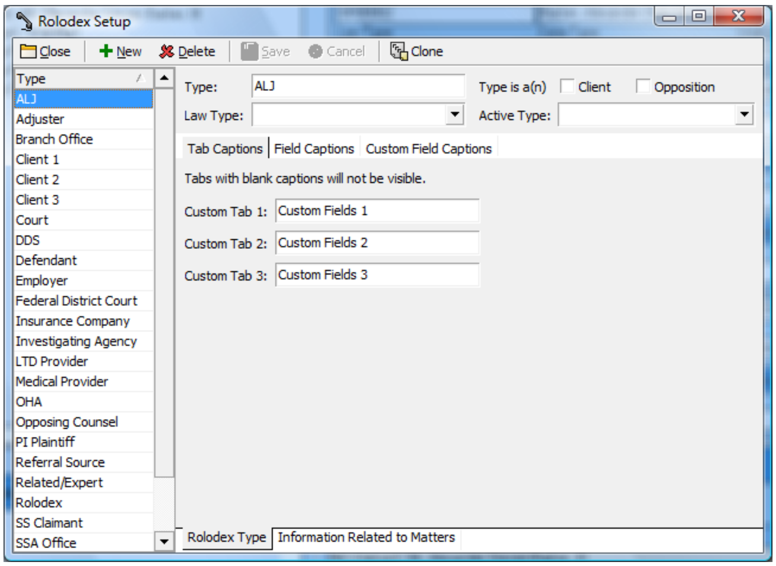
*NOTE: Before you delete a user account, use the *Reassigning Employees* feature in the Prevail Control Panel to reassign the former employee's matters, appointments, and tasks to another user. See page 87 for instructions on using this feature. Then, follow these steps to delete a user account.

Step	Task
1	Click on Administration > Employees.
2	Click on the employee's name in the list on the left side of the User Preferences window.
3	On the right side of the User Preferences window, uncheck the box that says "Employee is active".
4	Click 'Save' in the upper right corner of the User Preferences window.
5	Click on the red X (delete) button on the left side of the User Preferences window.
6	Click 'Delete' to confirm that you want to delete the employee.
7	Close the User Preferences window.

Chapter Three: Administration Menu

Several features in Prevail are reserved for users with an Administrator security setting. Other users will not see the Administration menu when logged into Prevail. Administrators will use this menu to accomplish a variety of tasks within Prevail, such as creating/modifying merge document templates, creating/modifying Rolodex types, and modifying user-definable lists.

Rolodex Types



Prevail is pre-loaded with numerous Rolodex types (e.g., SS Claimant, Medical Provider, Adjuster) that you choose from when setting up a new Rolodex entry. You may modify this list by adding, changing, or deleting entries from the Administration → Rolodex Setup menu.

<u>Creating New Rolodex Types</u>

Follow these steps to create a new Rolodex entry type.

Step	Task
1	Click on 'Administration' from the main menu, and then select 'Rolodex Setup'.
2	Click on the type called 'Rolodex' in the column on the left side of the Rolodex Setup window.
3	Click on 'Clone' at the top of the Rolodex Setup window.

Creating New Rolodex Types *(continued)*

Step	Task
4	Enter a name for the new Rolodex type in the 'Type' field, by typing over Rolodex – [CLONED].
5	Select whether the new Rolodex type represents your firm's client or the opposition. *Note: If the new Rolodex type doesn't represent your firm's client or the opposition, or could possibly be either, leave both boxes unchecked.
6	If the Rolodex type will only apply to one specific law type, select the appropriate type from the 'Law Type' drop-down list
7	If desired, select the appropriate 'Active Type'. *Note: The 'Active Type' is the default role that the party will fill when you attach it to a matter.
8	Click on the Field Captions tab to view the phone number types already associated with this Rolodex type.
9	Review the Phone # fields, and decide if you need to change any of the Phone # Fields. If you would like to make any changes, enter the new field names you would like to use in the Phone and Alternate Phone fields as necessary. (For example, if this new Rolodex type is for an individual, you might choose to define the Phone # field captions as "home," "work," "cell," "pager," and "fax".
10	Each Rolodex Entry window contains several pre-defined tabs (i.e., pages) that contain various information about the entry. These tabs include Alternate Contact, Notes, and Attached Matters. Prevail also allows you to create up to three additional custom tabs for any new Rolodex types that you create. • If you do not want to create additional tabs, you may skip this step. You may return to this procedure at any time in the future if you decide to set up custom tabs. • If you want to create an additional tab(s) for your new Rolodex type, follow these steps: a) Click on the Tab Captions tab. b) Enter the name(s) you would like to assign to your custom tabs. c) Click on the Custom Field Captions tab. d) For each field that you would like to add to your custom tab(s), choose whether the field will be a Text, Date, Number, or Logical (true/false) field, and enter the caption for each field you want to add.
11	Click 'Save'.
12	Repeat steps 2-11 for any additional Rolodex types that you want to create.

Editing Rolodex Types

Follow these steps to modify a Rolodex type.

Step	Task
1	Click on 'Administration' on the main menu, and select 'Rolodex Setup'.
2	Highlight the Rolodex type that you want to edit.
3	Enter any necessary changes in the appropriate fields.
4	Click 'Save'.

Deleting Rolodex Types

Follow these steps to delete a Rolodex type.

*Note: Certain Rolodex types are set up as defaults that you will not be able to delete. Call Prevail Tech Support for assistance in deleting these Rolodex types.

Step	Task
1	Click on 'Administration' on the main menu, and select 'Rolodex Setup'.
2	Highlight the Rolodex type that you want to delete.
3	Click 'Delete'.

Creating Merge Document Templates in Prevail

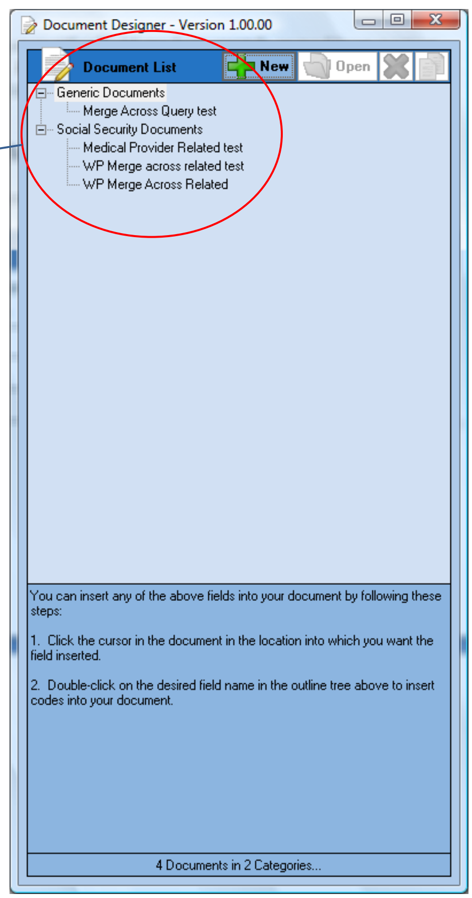
One of Prevail's most powerful time-saving features is its document creation and management capability. Prevail speeds up the document process by doing the data entry work for you. The only thing you have to do is select the letter or form to merge. With a few mouse clicks, you'll be merging documents, saving time, and being more productive than ever before.

Prevail 5 is compatible with Microsoft Word 2000, 2002 (XP), 2003, and 2007, and Corel Word Perfect Suites 9-X4 (14). 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 modifying existing forms and letters, creating new forms and letters, and merging documents with matters.

To create new merge document templates, you may either build one from scratch, or modify an existing template to meet your needs. It's usually easier to modify an existing template that contains most or all of the fields that you want to include in your new document!

<u>Creating a New Merge Document by Modifying an Existing Document</u>

The document tree lists all of the available documents to merge. All matters will allow "Generic Documents" to be merged. In addition, you may merge "Social Security Documents" if you have a Social Security matter open, a "Personal Injury Document" if you have a Personal Injury matter open, etc.



Creating a New Merge Document Template by Modifying an Existing Document Template *(continued)*

Follow these steps to create a new document template by modifying an existing one.

Step	Task
1	Click on 'Administration', and then click on 'Document Setup'. The Document Designer window appears.
2	Click on the 'Clone' button in the upper-right corner of the Document Designer window. A duplicate copy (with the word "Clone" at the end of the document title) will appear in the list of available documents, just above the original document.
3	Enter a new name for the new document in the 'Document Name' field. You may also complete the following document property fields as desired: • Category – how the document will be classified on the History tab when merged for a matter • Time and Time Category – enter the amount of time, in hours, that an employee will spend each time the document is merged for a matter. Prevail will automatically enter a time entry in the ledger for this matter. • Cost and Cost Category – enter the cost that your firm will incur each time this document is merged for a matter. Prevail will automatically enter a cost entry in the ledger for this matter. • Task Start – Prevail will automatically enter a task on the selected user's task list each time this document is merged for a matter. For example, if you select 30 for this field, Prevail will begin showing a task on the selected user's task list 30 days after the merge document is generated for the matter. • Task Due – the due date for the task that Prevail will automatically generate when the merge document is generated for a matter. • Task Assigned – select a user to have the task assigned to • Task Subject – enter instructions for the task that will automatically appear on the selected user's task list. For example, if you generate a request for medical records, you might make the subject of the subsequent task, "Did we receive requested medical records?" • Process – select the process step that you would like the matter to automatically advance to when this document is merged for a particular matter.
4	Click 'Save'.
5	Highlight your new document in the list, and click 'Open'. Your document displays in your word processing program, and the Document Designer displays a list of available merge fields.

Creating a New Merge Document Template by Modifying an Existing Document Template *(continued)*

Step	Task
6	With your word processing document window and Prevail Document Designer window open beside each other, insert merge fields in your document using these steps: a) Position the cursor in the document where you would like to insert the merge field. b) Locate the appropriate merge field in the Document Designer by expanding the categories of possible fields. When you locate the desired field, double-click on it to insert it in your document. *Note: To insert an automatic date field, use the 'Merge Date' field code, *not* the 'Date' field code. The 'Merge Date' field is located in the 'Insert Codes' group in the list of available field codes in the Document Designer.
7	Modify any other text in the document as desired.
8	*IMPORTANT: Click 'Save' at the top of the Document Designer window! Do *not* use the 'Save' or 'Save As' functions within your word processing program.
9	Close the Document Designer window.

Creating a New Merge Document Template from Scratch

Step	Task
1	Click on 'Administration', and then click on 'Document Setup'. The Document Designer window appears.
2	Click on the '+ New' button at the top of the Document Designer window.
3	Enter a 'Document Title' and choose a 'Document Category' for the new document.
4	Click 'Finish'. Your document displays in your word processing program, and the Document Designer displays a list of available merge fields.

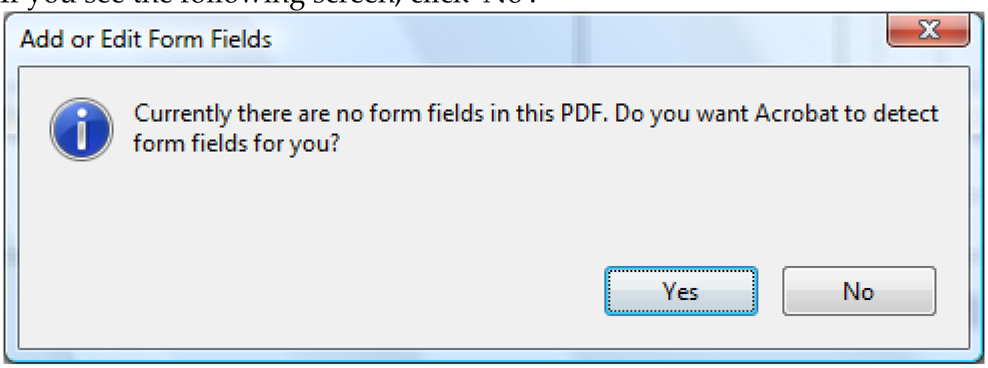
Creating a New Merge Document Template from Scratch *(continued)*

Step	Task
5	Complete the following document property fields as desired: • Category - how the document will be classified on the History tab when merged for a matter • Time and Time Category – enter the amount of time, in hours, that an employee will spend each time the document is merged for a matter. Prevail will automatically enter a time entry in the ledger for this matter. • Cost and Cost Category – enter the cost that your firm will incur each time this document is merged for a matter. Prevail will automatically enter a cost entry in the ledger for this matter. • Task Start – Prevail will automatically enter a task on the selected user's task list each time this document is merged for a matter. For example, if you select 30 for this field, Prevail will begin showing a task on the selected user's task list 30 days after the merge document is generated for the matter. • Task Due – the due date for the task that Prevail will automatically generate when the merge document is generated for a matter. • Task Assigned – select a user to have the task assigned to • Task Subject – enter instructions for the task that will automatically appear on the selected user's task list. For example, if you generate a request for medical records, you might make the subject of the subsequent task, "Did we receive requested medical records?" • Process – select the process step that you would like the matter to automatically advance to when this document is merged for a particular matter.
6	Enter hard codes (text that will never change in the letter, regardless of which matter you are working in) in the letter.
7	Insert merge fields in your document using these steps: a) Position the cursor in the document where you would like to insert the merge field. b) Locate the appropriate merge field in the Document Designer by expanding the categories of possible fields. When you locate the desired field, double-click on it to insert it in your document. *Note: To insert an automatic date field, use the 'Merge Date' field code, not the 'Date' field code. The 'Merge Date' field is located in the 'Insert Codes' group in the list of available field codes in the Document Designer.
8	*IMPORTANT: Click 'Save' at the top of the Document Designer window! Do *not* use the 'Save' or 'Save As' functions within your word processing program.
9	Close the Document Designer window.

<u>Creating Merge Document Templates from Adobe PDF Files</u>

As a new feature in Prevail 5, if you have Adobe Acrobat 9.0 <u>Standard or Professional</u> or Adobe Acrobat 6.0-8.0 <u>Professional</u> installed on your computer, you'll be able to create Prevail merge document templates directly from Adobe PDF files. This feature is particularly helpful when you obtain forms from a government agency's (e.g., Social Security Administration, state workers' compensation office) website. Such forms are usually only available in PDF format.

Follow these steps to create a Prevail merge document template from an Adobe PDF file.

Step	Task
1	Open the Adobe PDF file that you want to use as a Prevail merge document template.
2	Click on 'Forms', and select 'Add or Edit Fields' from the drop-down list.
3	If you see the following screen, click 'No'. 
4	Click the 'Add New Field' button in the upper left area of the Adobe window, and select 'Text Field' from the drop-down list.
5	Use your mouse to drag the new text field into the appropriate position in the form.
6	Double-click on the text field to open the 'Text Field Properties' window.
7	On the General tab within the 'Text Field Properties' window, type the merge field label **<u>exactly as it appears in the Prevail Document Designer, including the brackets</u>** (e.g., [SS Claimant-First Name]) in the 'Name' field.
8	Click on the Appearance tab within the 'Text Field Properties' window.
9	Select '8' from the 'Font Size' drop-down list.
10	Click 'Close'.
11	Repeat steps 4-10 of this procedure for each merge field that you need to add to this form.
12	Click the 'Close Form Editing' button in the upper right area of the Adobe window.

Creating Prevail Merge Document Templates from Adobe PDF Files *(continued)*

Step	Task
13	Click 'File', and then choose 'Save As' from the drop-down list.
14	Save the file with your desired filename in the appropriate folder (e.g., Generic, Social Security, Personal Injury) within the Prevail Docs folder (located on your Prevail server drive).
15	Close Adobe Acrobat.
16	Open the folder in which you saved the new PDF merge template.
17	Right-click on the white space within the list of folder contents. Then, scroll down to 'New', and left-click on 'Text Document'. A file named 'New Text Document' appears in the list of folder contents.
18	Rename the 'New Text Document' with the same file name that you gave the PDF template (without the .pdf extension).
19	Close the folder contents window.

Deleting a Merge Document Template

If there is a document template in the Document Designer that you do not need, you may delete it. For example, if a form becomes obsolete and you replace it with an updated version, you may need to delete the old one (if the new one is saved with a different filename).

Follow these steps to delete a merge document template from the Document Designer.

Step	Task
1	Click on 'Administration', and then click on 'Document Setup'. The Document Designer window appears.
2	Highlight the merge document that you want to delete.

Deleting a Merge Document Template *(continued)*

Step	Task
3	Click the red 'X' button at the top of the document designer window.
4	Click 'Delete' to confirm that you want to delete the merge document template.

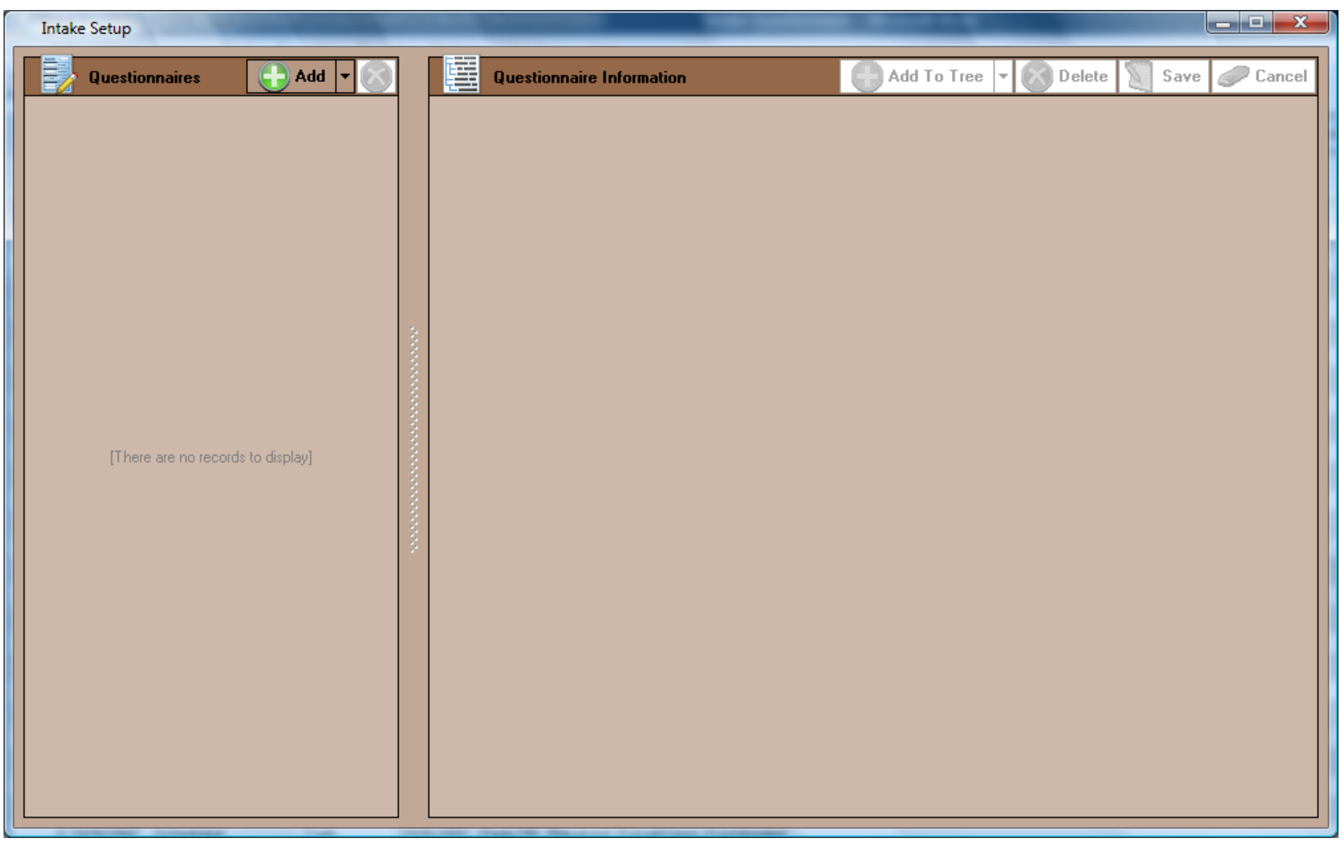
Intake Questionnaire

The Intake Questionnaire is a powerful new feature in Prevail 5. It allows you to design a custom flow chart of questions and scripts to use while interviewing a prospective new client. You may create multiple questionnaires, and select the appropriate questionnaire to use based on the law and case type of the prospect.

You may also set the Intake Questionnaire to automatically create new Rolodex entries, a new prospect, or a new matter after completing the set of interview questions.

After Prevail creates a prospect or matter upon completing a questionnaire, the program also saves the questionnaire in its entirety (all questions and answers) as a text file on the History tab.

Creating a New Intake Questionnaire



Creating a New Intake Questionnaire *(continued)*

Follow these steps to create a new questionnaire template.

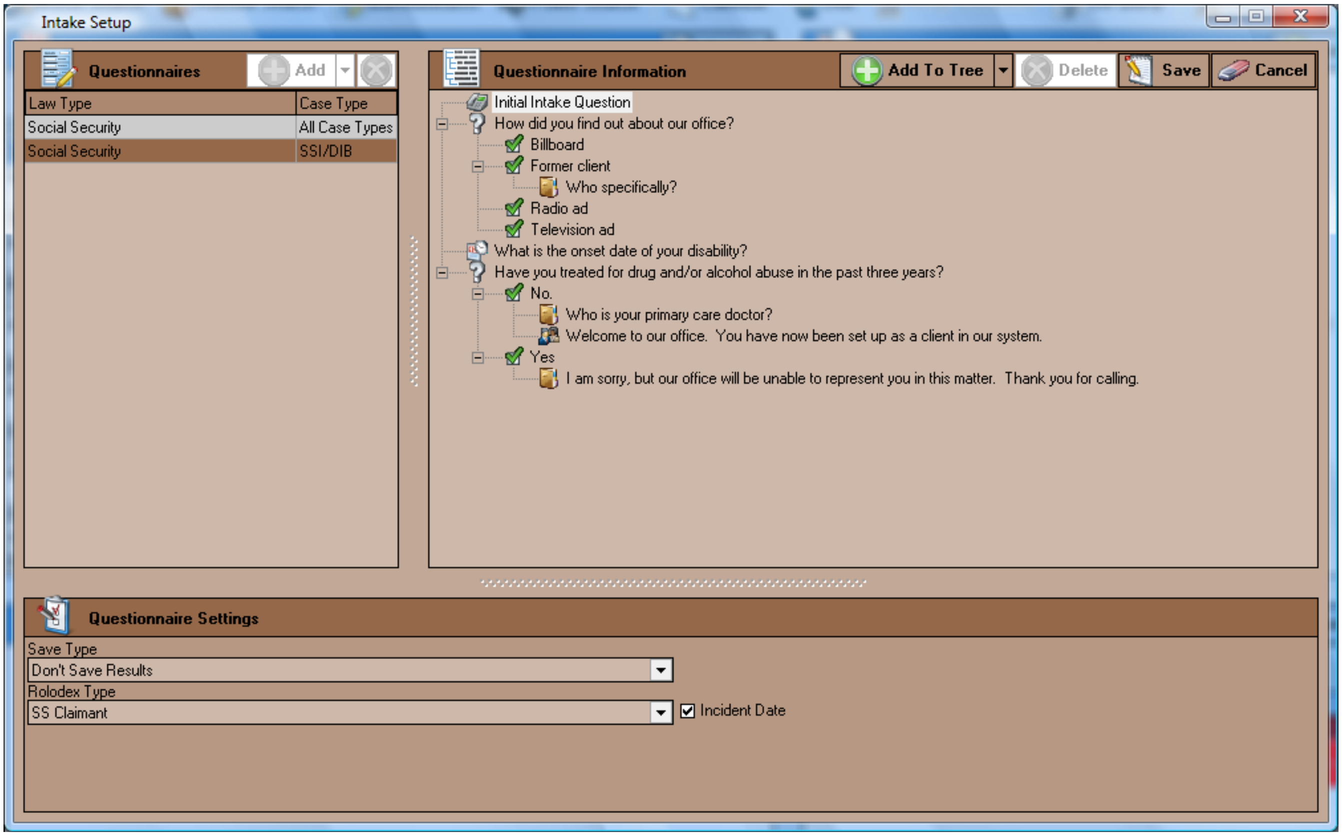
<table>
<tr><th>Step</th><th>Task</th></tr>
<tr><td>1</td><td>Click on Administration > Questionnaire Setup.</td></tr>
<tr><td>2</td><td>Click on '+ Add' in the upper left area of the window.</td></tr>
<tr><td>3</td><td>Select the appropriate law type and case type for which you will use the questionnaire from the drop-down list that appears.
*Note: For each law/case type combination (e.g., Social Security All Case Types, Personal Injury Auto Accident), you may only create one questionnaire. For example, once you have created a questionnaire for Social Security SSI cases, you will not have the option to create another Social Security SSI intake questionnaire.</td></tr>
<tr><td>4</td><td>Click on 'Add to Tree' in the right side of the window, and select the appropriate question type from the drop-down list that appears.
Contact – Use this question type to automatically create a Rolodex entry for the answer to the question. The Rolodex entry will be attached to the matter tree if you set the questionnaire to automatically create a matter or prospect at the conclusion of the questionnaire. For example, you might ask how the prospect found out about your office (Referral Source) or the name of his or her primary care doctor (Medical Provider).
Currency – Use this question type to automatically format the response as currency. For example, you might ask a prospective client, "What is your average weekly wage?"
Memo – Use this question type to allow for a text entry of unlimited length. For example, you might ask, "Describe your disability."
Number – Use this question type to enter a numerical response. For example, you might ask, "How many dependents do you have?"
Pick – Use this question type to enter a multiple-choice question. For example, you might ask, "How did you find out about our office?" as a 'Pick' question with 'Selected' choices including former client, billboard, radio advertisement, or television commercial.
Script – Use this question type to enter a defined script that you would read to the prospective client.
Selected – Use this question type for each choice in a list of options under a 'Pick' question type. For example, underneath the 'Selected' question, "How did you find out about our office?" you could enter several 'Pick' question types, such as former client, billboard, radio advertisement, and television commercial.
*Note: The 'Selected' question type is only available for insertion under a 'Pick' question.
Text – Use this question type to prompt for a brief text response. For example, you might ask a prospective client, "Which body parts are affected by your injury?"</td></tr>
</table>

Creating a New Intake Questionnaire *(continued)*

Step	Task
4 *(cont.)*	• Terminate Questionnaire – Use this question type if the questionnaire should be terminated without further processing, based on a certain response. For example, you might want to terminate a questionnaire if a prospective client replied, "Yes," when asked "Have you treated for alcohol and/or drug abuse within the past three years?"Currency – Use this question type to automatically format the response as currency. For example, you might ask a prospective client, "What is your average weekly wage?" • Create Prospect/Create Matter – Use this question type to prompt the Intake Questionnaire to automatically create a prospect or matter. You would typically assign one of these two question types to the final question in the Intake Questionnaire. • *Note: You *must* assign one of the following question types to the final question in your questionnaire: • Terminate Questionnaire • Create Prospect • Create Matter
5	Enter the question you would like to ask in the 'Prompt' field in the lower-right area of the window.
6	For each question, you may choose to save the response in a pre-determined field on the Matter tab for the case in Prevail. For example, if you ask, "What is the onset date of your disability?", you might choose to save the response to this question in the 'Onset Date' field on the Matter tab. If you wish to save the response to a question in a Matter field, • change the 'Save Type' drop-down list from "Don't Save Results" to "Matter Fields" and • select the appropriate Matter field from the 'Save Matter Field' drop-down list.
7	Click 'Save' in the upper right area of the window when you have finished setting up the Intake Questionnaire.

Intake Questionnaire Example

Below is a screen shot of an example Social Security Intake Questionnaire.



Setting User Preferences

You have the ability to change various aspects of Prevail's display for different users in your firm.

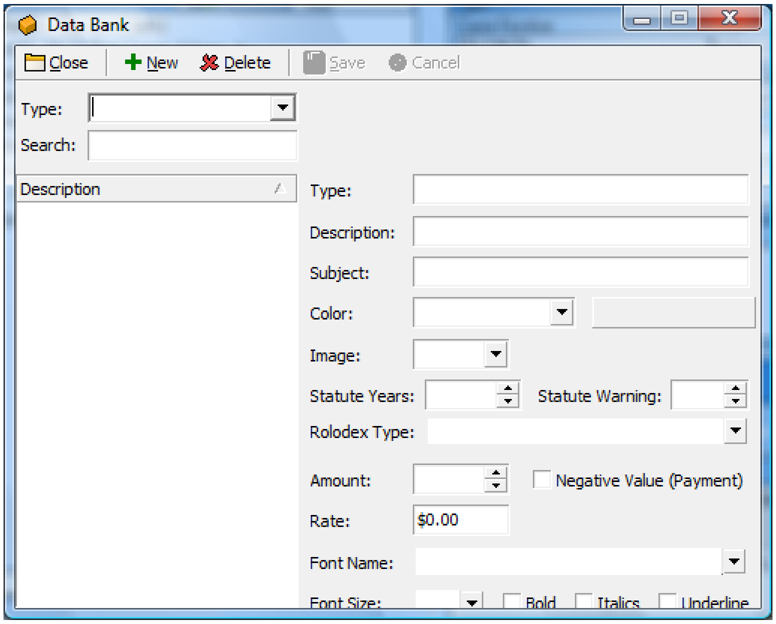
Follow these steps to modify Prevail user preferences.

Step	Task
1	Click on 'Administration' from the Prevail main menu, and then click on 'Employees'. The 'User Preferences' window appears.
2	In the list on the left side of the window, click on the user whose preferences you want to modify.
3	Click on the Contact tab on the right side of the 'User Preferences' window to modify any basic information about the user (e.g., address, phone number.

Setting User Preferences *(continued)*

Step	Task
4	Click on the Preferences tab on the right side of the 'User Preferences' window to change any of the following: <u>General Preferences</u> • whether to display the user's appointment list, task list, or calendar view (day, week, or month) when he or she first logs in to Prevail • whether the user is prompted for confirmation (i.e., "Are you sure you want to exit Prevail?" each time he or she closes the program • which word processing program (Microsoft Word or Corel WordPerfect) the employee uses <u>Calendar Preferences</u> • whether to display week numbers • whether to enable task and appointment alarms (warnings when a task or appointment due date is approaching) • the start and end times for the user's work day • time blocks (15, 20, 30, or 60 minutes) for the user's calendar • which days of the week and in which order to display these days <u>Appearance</u> • color choices for different screens in Prevail
5	Click on the Notes tab on the right side of the 'User Preferences' window to enter any miscellaneous information about the employee.
6	Click 'Save' in the top right corner of the 'User Preferences' window after you have made all necessary changes in all tabs (Information, Preferences, and Appearance) of the 'User Preferences' window.

Databank



The Prevail Databank is the home of all of the lists that reside in various parts of the program. The Databank is essentially a "list of lists." For example, the Databank allows you to control the list that contains all of your choices for appointment types (e.g., training, meeting).

*Note: Not all lists are user-definable. Some of the lists that reside in Prevail are definable only by our technical support staff. If you have questions about a list that you do not see in the databank, please call Tech Support.

Location of User-Definable Lists in Prevail

This table explains where the various user-definable lists are located throughout Prevail.

List	Where the list is located in Prevail…
Ailment	Disabilities tab (Social Security matters only)
Appointment	Calendar (appointment entry window)
Case Status	Matter tab
Case Type	Matter tab
Cost	Ledger tab
Damage	Damages tab (Personal Injury and Workers' Compensation matters only)

Location of User-Definable Lists in Prevail *(continued)*

List	Where the list is located in Prevail…
Employee	Administration > Employees
Fee	Ledger tab
History	History tab (category selection)
Image	Calendar (appointment entry window)
Language	Rolodex entry window
Location	Calendar (appointment entry window)
Prefix	Rolodex entry window
Priority	Calendar (task entry window)
Suffix	Rolodex entry window
Task	Calendar (task entry window)
Task Status	Calendar (task entry window)
Time	Ledger tab
Title	Rolodex entry window

Modifying Lists in the Databank

Follow these steps to modify any of the lists contained in the Prevail Databank.

Step	Task
1	Click on 'Administration' from the main menu, and then click on 'Databank'.
2	Choose the list that you want to modify from the 'Type' drop-down list.
3	• To add an entry to the selected list, click 'New' at the top of the window, and enter a description of the new entry in the 'Description' field. Then, click 'Save'. • To delete an entry from the selected list, highlight the entry that you want to delete, and click 'Delete' at the top of the window. Then, click 'Yes'. • To modify an entry in the selected list, highlight the entry that you want to modify. Then, enter the new description in the 'Description' field, and click 'Save'.
4	When you're finished making additions, deletions, and/or modifications, click 'Close' at the top of the Databank window.

Process Builder

The Process Builder is a powerful tracking feature which allows you to pre-program an expected sequence of events based on a set of rules which you define. Prevail comes with a pre-defined claims process for Social Security matters, and you may create processes for other law types (e.g., Personal Injury, Workers' Compensation). The Process Builder not only tracks the steps of a claim on the Claims tab (also known as the Processes tab, when you're working in matters other than Social Security), but also encompasses document generation, history tracking, and automatic calendaring features.

Remember, Prevail comes pre-loaded with a Social Security process. Here are some examples of other situations in which you might want to create and implement a process:

- an administrative process with multiple deadlines and critical dates preceding the actual trial date, each by a fixed number of days. Once you create and define the steps of this process, it would allow you to input the trial date, and back-fill all of the other dates and set automatic reminders for them.
- a checklist of tasks that always need to be completed in the processing of a particular type of case, where you want Prevail to track specific tasks for different staff members and track when the tasks are completed.

Questions to Consider as You Create a Process

The Process Builder is based on the understanding that there are certain repeated patterns that occur in any type of law or administrative process based on pre-determined rules. As you consider the steps and levels that you need to include in a process you're building, ask yourself these questions:

- What happens next?
- Does a document need to be generated as a result of this step?
- Does an appointment need to be scheduled as a result of this step?
- Does the step represent a statute or deadline which must be tracked?
- Do other parts of the data in the matter need to be changed when this step is reached?

The Process Builder has the ability to handle all of these things – it just needs to be told what to do each step of the way!

Creating a New Process

Follow these steps to create a new process.

Step	Task
1	Click on 'Administration' from the main menu, and then click on 'Process Builder'. A 'Process Builder' window appears.
2	Click on 'New Process' at the top of the window.

<u>Creating a New Process *(continued)*</u>

Step	Task
3	Enter a name for the new process in the 'Subject' field.
4	Select the law type in which you'll use the new process from the 'Law Type' field.
5	Leave the 'Auto Fill' box unchecked.
6	Click 'Save & Close' at the top of the window. Prevail returns to the 'Process Builder' window.
7	Click on the new process in the list of processes in the top half of the window.
8	In the bottom half of the window (under "Steps & Rules"), click 'Add Step'. A 'New Step in _______ Process' window appears.
9	Choose the sequence for the new step in the 'Order' field. (For example, the first step in the process is order 1, the second step is order 2, and so on.)
10	Enter a name for the level the step belongs to in the 'Level' field. (A "level" is a group of related steps. For example, in Social Security, levels might be "application," "reconsideration," "appeal," etc.)
11	Choose "step" from the 'Type' drop-down list.
12	Enter a description of the step in the 'Subject' field.
13	If desired, check the 'Win' or 'Loss' checkbox to indicate whether this step represents a win or loss for you. *Note: If the step doesn't represent a win or loss, you may leave both of these boxes unchecked.
14	• If there is a follow-up task that should result from this step, enter the number of days after this step takes place that the task should be due, in the 'Set Statute to Run' field. • If there isn't a follow-up task that results from this step, leave the 'Set statute to run' field blank.
15	• If there is a follow-up task that results from this step, enter the number of days *ahead of the task due date* that you would like the task to start appearing in your task list. (For example, if the task due date is 60 days after this step, you might enter 10 in the 'Set a statute warning task' field to start seeing the task in your task list 10 days prior to the due date.) • If there isn't a follow-up task that results from this step, leave the 'Set a statute warning task' field blank.

Creating a New Process *(continued)*

Step	Task
16	If you entered a follow-up task, enter a description of the follow-up task in the 'Set statute subject to' field.
17	Click on the 'Perform the following' tab, located near the middle of the window.
18	If you would like for a merge document to be automatically generated for the matter when it reaches this step in the process, choose the appropriate merge document from the 'Merge Document' drop-down list.
19	If desired, click the checkbox for 'Prompt for: Appointment' or 'Prompt for: Task' if you would like to be automatically prompted to create an appointment or task when a matter reaches this step. *Note: If you set a statute task for the step, you will <u>not</u> be able to also have the step prompt the user to manually input a task or appointment.
20	If desired, you may set certain matter fields to update automatically when a matter reaches this step. (For example, many users who use this function set the "Status" field on the matter screen to update automatically with the most recent step entered on the Claims tab.) *Note: To set these fields to automatically update, please call the Tech Support or Training department, and a Prevail representative will explain how to set up these automatic updates.
21	Click 'Save & Close'.
22	Repeat steps 8-21 of this procedure for any additional steps that you need to create.
23	After you have created all of the steps in the process, re-open each step by double-clicking on it. Then, choose the correct next step in the process by selecting it from the 'Next Step – Step' drop-down list at the bottom of the 'Edit Step' window. *Note: If a step doesn't have a *definite* next step (in other words, there is more than one possibility for what may take place next in the process), you may leave this field blank.
24	Close the 'Process Builder' window after you have finished setting up each step in the new process.

Creating a New "Auto-Fill" Process

There may be times when you have a checklist of steps to complete, and all of these steps are based on a single date (in Prevail terms, an "anchor date"). For example, when you receive a notice of hearing or trial, you might want to use this hearing or trial date as the "anchor date" and have automatic reminders set up in the days leading up to the hearing or trial.

You will need to follow a slightly different set of steps to create an "auto-fill" process in Prevail.

Follow these steps to create a new "auto-fill" process.

Step	Task
1	Click on 'Administration' from the main menu, and then click on 'Process Builder'. A 'Process Builder' window appears.
2	Click on 'New Process' at the top of the window.
3	Enter a name for the new process in the 'Subject' field.
4	Select the law type in which you'll use the new process from the 'Law Type' field.
5	Check the 'Auto-Fill' box.
6	Click 'Save & Close' at the top of the window. Prevail returns to the 'Process Builder' window.
7	Click on the new process in the list of processes in the top half of the window.
8	In the bottom half of the window (under "Steps & Rules"), click 'Add Step'. A 'New Step in _______ Process' window appears.
9	Choose the sequence for the new step in the 'Order' field. (For example, the first step in the process is order 1, the second step is order 2, and so on.)
10	Enter a name for the level the step belongs to in the 'Level' field. (A "level" is a group of related steps. For example, in Social Security, levels might be "application," "reconsideration," "appeal," etc.)
11	Choose "step" from the 'Type' drop-down list.
12	Enter a description of the step in the 'Subject' field.

Creating a New Process *(continued)*

Step	Task
13	Enter the number of days prior to the anchor date that you would like the reminder to appear on your task list, in the 'Perform this Rule' field. **IMPORTANT: If you are setting up a process that works *backwards* from a set anchor date (for example, a trial preparation process, with the trial date as the anchor date), you must enter this number as a *negative* number (e.g., if you want the reminder to appear 60 days prior to the anchor date, enter -60). On the other hand, if you are setting up a process such as an intake process, you'll need to enter the number of days as a *positive* number.
14	Click 'Save & Close'.
15	Repeat steps 8-14 of this procedure for any additional steps that you need to create.
16	Close the 'Process Builder' window after you have finished setting up each step in the new process.

Editing an Existing Process

In addition to creating new processes from scratch, you may also modify existing processes to suit your needs.

Step	Task
1	Click on 'Administration' from the main menu, and then click on 'Process Builder'. A 'Process Builder' window appears.
2	Click on the process that you want to edit in the list of processes in the top half of the window.
3	Click on 'Edit' (the button with a pencil icon) at the top of the window.
4	Make any necessary changes to the 'Subject' or 'Law Type', and click 'Save & Close'. *Note: Remember to keep the 'Auto Fill' box *unchecked*!
5	To edit individual steps or rules within the process, click on the step you want to edit in the lower half of the window to highlight it.
6	Click on 'Edit' in the lower half of the window to edit the step.
7	Make any desired changes to the step.
8	Click 'Save & Close'.

Chapter Four: Building Matters

What's a matter? In Prevail lingo, it's a case. It may be a case for a new or existing client, or for a potential client, hereinafter referred to as a Prospect. Matters and Prospects, open or closed, have the same functional capabilities. It contains all of the related parties (attached via the Rolodex), facts, notes, critical dates, documents, and whatever other information you need to store about a SINGLE cause of action (if it's a litigation matter), a SINGLE work-related accident (if it's a Workers' Compensation case), or a SINGLE disabled person (if it's a Social Security case). Get the picture? The key word here is SINGLE. Prevail can contain as many matters as you want. Some firms have a hundred, some have tens of thousands. When you're going through your daily routine, you'll be going from matter to matter as the need arises, working first in one matter, then moving on to the next.

Creating a New Prospect or Matter

Since matters are basically a collection of parties (e.g., claimant, defendant, medical providers), you create matters through the Rolodex.

Follow these steps to create a new prospect or matter.

Step	Task
1	Click on 'Rolodex' on the toolbar. The Rolodex search window appears.
2	Change the 'Search Type' drop-down list to 'Any Part of Rolodex Title'.
3	Enter any character string from your client's first, middle, or last name in the 'Search Criteria' field.
4	Scroll through the list of results to see if your client has an existing Rolodex entry. • If your client appears in the list of results, double-click on your client's Rolodex entry, and then SKIP TO STEP 7 of this procedure. • If your client <u>does not</u> appear in the list of results, CONTINUE TO STEP 5 of this procedure.
5	Click on the green '+New' button at the top of the Rolodex entry window.
6	Enter as much information as you have about your client in the Rolodex entry window.
7	At the bottom of the Rolodex entry window, under "Create Prospect/Matter", select the • Prospect Type (PI Plaintiff, SS Claimant, WC Claimant, etc.) • Case Type and • Incident Date (if applicable)

Creating a New Prospect *(continued)*

Step	Task
8	Click ‘Create Prospect’. A matter window will appear. *Note: If you want to create a matter immediately, rather than creating a prospect to activate later, click on 'Create Matter' instead of 'Create Prospect'.
9	You may add other information on the right side of the matter window, as needed.

Activating Prospects as Matters

Follow these steps to activate a prospect as a matter.

Step	Task
1	Click on the ‘Search' button in the Prevail toolbar. The matter search window appears.
2	Change the ‘Search Type’ drop-down list to ‘Any Part of Matter Title’.
3	Make sure that the 'Matter/Prospect' drop-down list is set to "Matters and Prospects" or "Prospects Only" so that prospects will appear in the list of search results.
4	Enter any character string from your client’s first, middle, or last name in the ‘Search Criteria’ field.
5	Double-click on the appropriate name in the list of results to open the Prospect.
6	Click on the 'Status' drop-down and choose 'Activate Matter' to activate the Prospect as a Matter. The Tab Header will now identify the case as a matter instead of a prospect (e.g., "Open Social Security <u>Matter</u> Information" instead of "Open Social Security <u>Prospect</u> Information"). Also, a case number is automatically assigned to the newly activated matter.

Closing or Deleting Prospects or Matters

Closing a prospect or matter does <u>not</u> remove it from your system. It simply changes the Tab Header to say "closed" instead of "open" (e.g., "Closed Social Security Matter Information" instead of "Open Social Security Matter Information").

IMPORTANT: Before you can permanently delete a prospect or matter, you must first close it!

To *close* a prospect, click on the green 'Status' drop-down, and choose "Close Prospect". To close a matter, click on the green 'Status' drop-down, and choose "Close Matter".

Closing or Deleting Prospects or Matters *(continued)*

After you have *closed* the prospect or matter, you may then delete it by once again clicking on the green 'Status' drop-down, and selecting either "Delete Prospect" or "Delete Matter".

Attaching Other Parties to a Matter

After you have set up a matter, you'll need to attach additional parties to it.

Follow these steps to attach additional parties to a matter.

*Note: Use these steps to add parties to a matter immediately after creating it or at any point in the future of the matter.

Step	Task
1	Click on the 'Matters' button in the tool bar at the top left of the screen.
2	Select 'Any Part of Matter Title' from the 'Search Type' drop-down list.
3	Enter a character string from your client's name (last or first) or Social Security number in the 'Search Criteria' field.
4	When the list of matching matters appears, double-click on the matter you are searching for.
5	Click on the 'Attach' button, which is located in the page name area above the matter tree on the left side of the screen. A search wizard appears.
6	Enter a character string from the party's last, first, or middle name in the 'Search Criteria' field. A list of matching entries appears.
7	Review the list of matching entries. • If an entry appears for the party you want to attach to the matter, SKIP TO STEP 12 of this procedure. • If an entry <u>does not</u> appear for the party you want to attach to the matter, CONTINUE TO STEP 8 of this procedure.
8	Click the green '+' button to the right of the 'Type' drop-down list in this window. A new Rolodex entry window appears.
9	In the Rolodex entry window, select the Rolodex type first, and then enter any other information you have about the party you want to attach to the matter.
10	Click 'Save'.
11	You will be returned to the list of matching entries, and the Rolodex entry you just created will now appear in the list of matching entries.

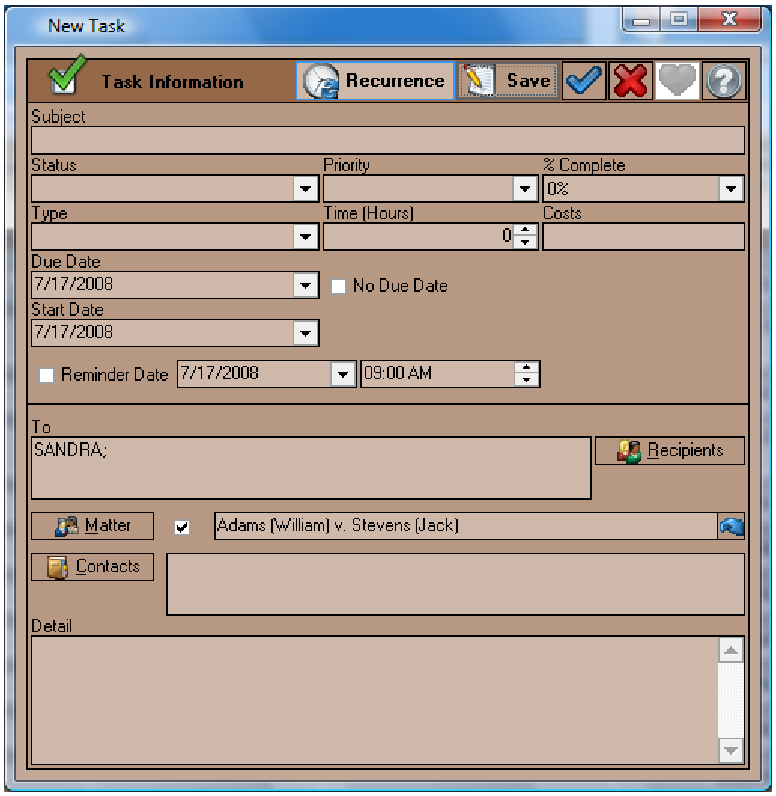
Attaching Other Parties to a Matter *(continued)*

Step	Task
12	In the matter tree on the right side of the window, highlight the name of the matter or party you want to attach to. *Note: In Prevail, you cannot attach a Medical Provider, Referral Source, or Employer to a matter. You must attach such parties directly to a claimant by highlighting the claimant's name, not the matter title, in the matter tree.
13	After you have selected the appropriate party to attach to, choose how the party relates to the matter from the 'Add As Type' drop-down list. *Note: The 'Add As Type' defaults to the Rolodex type that you selected for the party you are attaching, but you can change it as needed. For example, if you set the party up as a "SS Claimant" in their Rolodex entry, but they are the "Referral Source" in this matter, simply change the type in the 'Add As Type' drop-down list. This change will not affect the party's Rolodex type; it only changes how the party is attached to this particular matter.
14	Click the 'Attach' button in the lower right corner of this window.

Chapter Five: Calendar

Appointments, tasks – what's the difference? Allow us to explain! A *task* is a "to-do" of sorts. You may have a deadline for completing the assignment, but it doesn't involve a specific location or time. Examples of tasks include, "Follow up on medical records request," or "File Request for Reconsideration." An *appointment*, on the other hand, involves being at a specific place at a certain time. Examples of appointments include a hearing, deposition, or meeting with a client.

Creating a Task



Follow these steps to create a new task in your Prevail calendar.

Step	Task
1	Click on the 'Calendar' button on the toolbar.
2	Click on the arrow to the right of the '+Add' button at the top of the window. A drop-down list will appear with three choices: Appointment, Task, or Phone Message.
3	Click on "Task" from the drop-down list. A "New Task" window appears.
4	Enter a subject for the task in the 'Subject' field.

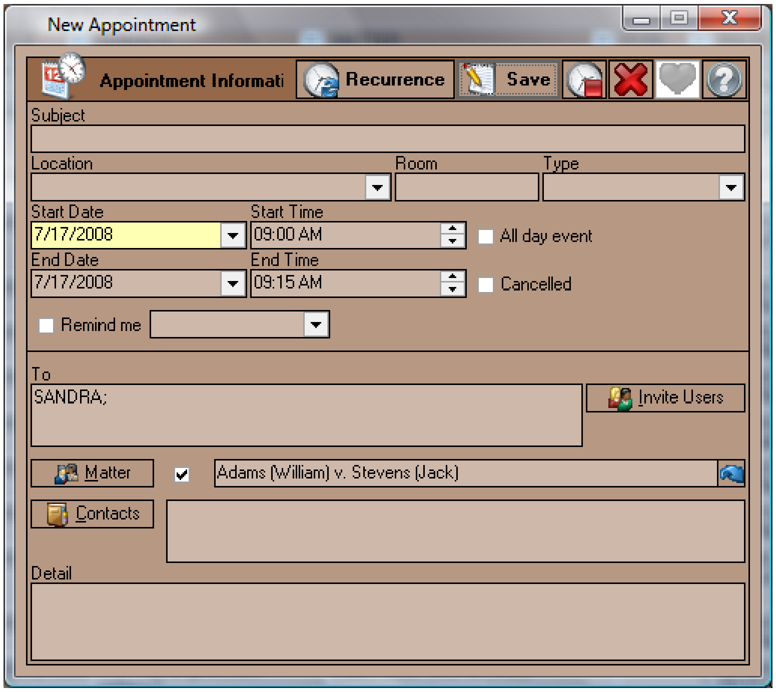
Creating a Task *(continued)*

Step	Task
5	Click on the "Priority" drop-down list, and select High, Medium, or Normal.
6	Click on the "Type" drop-down list, and select E-mail, Phone Message, Phone Call, or Research (depending on the type of task you are setting up).
7	Click on the arrow to the right of the "Due Date" field, and a calendar appears. Select a due date on the calendar, or check the "No Due Date" box if there is no specific due date for the task.
8	Click on the arrow to the right of the "Start Date" field, and a calendar appears. Select a start date on the calendar. *Note: The Start Date is the date the task will begin appearing in the responsible party's Prevail task list.
9	If you would like to set a Reminder Date/Time for the task, click in the box to the left of the "Reminder Date" field, and then click on the arrow to the right of the "Reminder Date" field. Choose a reminder date from the calendar that displays, and enter a reminder time in the time field.
10	• If you are the only person at your firm responsible for completing the task, move to Step 15 of this procedure. • If other Prevail users at your firm are also involved in the task, click on the 'Recipients' button. A "Select Resources" window appears.
11	Highlight the name of the appropriate party in the list on the left side of the window. *Note: To select multiple names in the list at the same time, hold down the "Ctrl" key on your keyboard while clicking on the appropriate names.
12	After you have highlighted all of the appropriate names, click the 'Select' button in the middle of the window. The names you selected will appear in the list on the right side of the window.
13	If you want to remove any names from the list of selected resources on the right side of the window, highlight the name(s) on the right that you want to remove, and click the 'Remove' button in the middle of the window.
14	Click 'OK'.

Creating a Task *(continued)*

Step	Task
15	The Prevail calendar assumes that the task you are creating relates to the matter that you currently have open in Prevail. If this is correct, leave the matter title as-is. Otherwise, • if the task relates to a different matter, click on the 'Matter' button, and search for the correct matter. Double-click on it when it appears in the list of results. • if the task doesn't relate to any of your matters, simply uncheck the checkbox by the 'Matter' button.
16	If there are any Rolodex entries that you would like to attach to the task, follow these steps: • Click on the 'Contacts' button. A Rolodex search window appears. • Change the "Search Type" drop-down list to "Any Part of Rolodex Title". • Enter any character string from the contact's first, middle, or last name in the "Search Criteria" field. • Scroll through the list of results, and double-click on the appropriate contact's entry. You will be returned to the 'New Task' window with the party attached as a link that you can double-click to open the contact's Rolodex entry window.
17	Enter any specific details or instructions about the task in the "Details" field.
18	• If this task is a non-recurring task, skip to Step 18 of this procedure. • If this task will recur, you may set up a recurrence schedule for the task by clicking the 'Recurrence' button at the top of the window. When the "Task Recurrence" window appears, set the cycle of recurrence for the task. Click 'OK' after setting all details for the recurrence.
19	Click 'Save'.

Creating an Appointment



Follow these steps to create a new appointment in your Prevail calendar.

Step	Task
1	Click on the 'Calendar' button on the toolbar.
2	Click on the arrow to the right of the '+Add' button at the top of the window. A drop-down list will appear with three choices: Appointment, Task, or Phone Message.
3	Click on "Appointment" from the drop-down list. A "New Appointment" window appears.
4	Enter a subject for the appointment in the 'Subject' field.
5	Click on the 'Location' drop-down list, and select a location for the appointment.
6	Enter a room location in the 'Room' field.
7	Select an appointment type from the 'Type' drop-down list.
8	Click on the arrow to the right of the "Start Date" field, and a calendar appears. Select a start date on the calendar that appears.

Creating an Appointment *(continued)*

Step	Task
9	• If the appointment is an all day event, check the box for 'All Day Event'. The start time will automatically set to the "Start of Day" and "End of Day" preferences set up in your user preferences (which default to 9:00 A.M. and 5:00 P.M.). For more information on changing your "Start of Day" and "End of Day" times, see *Setting User Preferences* on page 21. • If the appointment is not an all day event, set a start time for the appointment using the 'Start Time' drop-down list.
10	Click on the arrow to the right of the "End Date" field, and a calendar appears. Select a end date on the calendar that appears.
11	Unless you have already set the appointment as an all day event, set an end time for the appointment using the 'End time' drop-down list.
12	If you would like to receive a pop-up window reminding you of the appointment a specific amount of time prior to the appointment, click on the 'Remind Me' box, and select a reminder timeframe from the 'Remind Me' drop-down list.
13	• If you are the only person at your firm involved in the appointment, move to Step 19 of this procedure. • If other Prevail users at your firm are also involved in the appointment, click on the 'Recipients' button. A "Select Resources" window appears.
14	Highlight the name of the appropriate party in the list on the left side of the window. *Note: To select multiple names in the list at the same time, hold down the "Ctrl" key on your keyboard while clicking on the appropriate names.
15	After you have highlighted all of the appropriate names, click the 'Select' button in the middle of the window. The names you selected will appear in the list on the right side of the window.
16	If you want to remove any names from the list of selected resources on the right side of the window, highlight the name(s) on the right that you want to remove, and click the 'Remove' button in the middle of the window.
17	Click 'OK'.
18	The Prevail calendar assumes that the appointment you are creating relates to the matter that you currently have open in Prevail. If this is correct, leave the matter title as-is. Otherwise, • if the appointment relates to a different matter, click on the 'Matter' button, and search for the correct matter. Double-click on it when it appears in the list of results. • if the appointment doesn't relate to any of your matters, simply uncheck the checkbox by the 'Matter' button.

Creating an Appointment *(continued)*

Step	Task
19	If there are any Rolodex entries that you would like to attach to the task, follow these steps: a) Click on the 'Contacts' button. A Rolodex search window appears. b) Change the 'Search Type' drop-down list to "Any Part of Rolodex Title". c) Enter any character string from the contact's first, middle, or last name in the 'Search Criteria' field. d) Scroll through the list of results, and double-click on the appropriate contact's entry. You will be returned to the 'New Appointment' window with the party attached as a link that you can double-click to open the contact's Rolodex entry window.
20	Enter any specific details or instructions about the appointment in the 'Details' field.
21	• If this appointment is a non-recurring task, skip to Step 21 of this procedure. • If this appointment will recur, you may set up a recurrence schedule for the appointment by clicking the 'Recurrence' button at the top of the window. When the 'Task Recurrence' window appears, set the cycle of recurrence for the appointment. Click 'OK' after setting all details for the recurrence.
22	Click 'Save'.

Microsoft Outlook Sync

Prevail comes with a utility program that will synchronize appointments and tasks in the Prevail calendar with Microsoft Outlook on any given computer. In order for this process to work, you must have both Microsoft Outlook and Prevail installed on the same computer. Whatever login name was used last to log into Prevail on the computer will be used for the Outlook sync. In other words, if you were logged into Prevail as "Bob," then all of Bob's appointments and tasks will be synchronized with Outlook.

The synchronization takes place through a separate program called "Outlook Sync.exe" which resides in the C:\Prevail folder on each Prevail workstation.

Follow these steps to set up the Outlook sync.
*Note: The Outlook Sync must be configured on each PC on which you wish to synchronize calendars.

Microsoft Outlook Sync *(continued)*

Step	Task
1	Right-click on your Windows desktop, and choose New > Shortcut.
2	Click on 'Browse', and navigate to C:\PREVAIL_CLIENT\Outlook Sync.exe.
3	Click 'Finish'.
4	Double-click on the new Outlook Sync shortcut on your Windows desktop.
5	An Outlook Sync settings window appears. In this window, a) confirm the Prevail user for whom you wish to synchronize appointments and tasks b) check the box that says "Launch at Windows startup" c) check the boxes to synchronize appointments in a two-way direction (Prevail to Outlook and vice-versa) and d) click 'Save' at the top of the Outlook Sync settings window.

You should now see an Outlook Sync icon in your Windows system tray (lower right area of your Windows desktop, near the system clock). When the Outlook Sync is sending information from Prevail to Outlook, a green dot will flash, and when it is sending information from Outlook to Prevail, a red dot will flash. If your PC goes into hibernation mode and you do not see either dot flashing for an extended period of time, you may need to restart the Outlook Sync by simply double-clicking on the Outlook Sync shortcut on your desktop.

If you ever want to modify the settings for the Outlook Sync on your PC, right-click on the Outlook Sync icon in your Windows system tray, and then click on Settings. Modify the settings as needed, and then click 'Save' at the top of the Outlook Sync settings window.

The first time Outlook sync runs, it will take a long time, since it's copying all appointments and tasks *both* ways (Prevail to Outlook and vice versa). Once the initial sync is completed, the Outlook sync program will run automatically. It will cycle continuously to see if any new appointments or tasks have been entered into Prevail or Outlook. If so, these appointments and/or tasks will be automatically copied from one location to the other.

Chapter Six: Matter & Rolodex Searches

Matter and Rolodex Searches

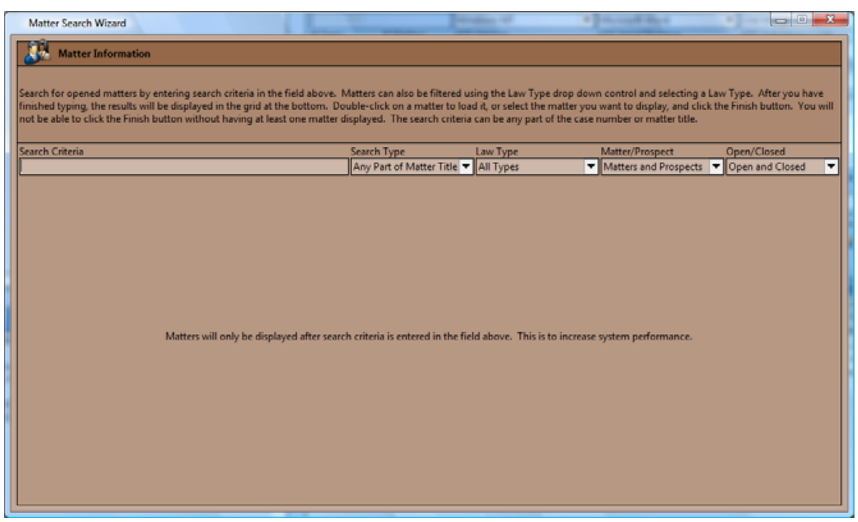
In Prevail, you may search your matters or your Rolodex entries.

Matter Search

Follow these steps to search for and navigate to a specific matter.

<table>
<tr><th>Step</th><th>Task</th></tr>
<tr><td>1</td><td>Click on the 'Matter Search' button, located near the upper left corner of your screen.</td></tr>
<tr><td>2</td><td>
Specify the search criteria you would like to apply to the search:

Search Type – choose either "Any Part of Matter Title" to enter any character string from the matter title (such as a character string from your client's last name, first name, or Social Security number) or "Matter List" (which will display a list of all matters)
Law Type – you may search all law types, or specify a certain one (e.g., Social Security, Personal Injury)
Matter/Prospect – you may search both matters and prospects, matters only, or prospects only
Open/Closed – you may search open and closed matters/prospects, open matters/prospects only, or closed matters/prospects only



</td></tr>
</table>

Matter and Rolodex Searches *(continued)*

Step	Task
3	If you chose "Any Part of Matter Title" as your Search Type, enter any character string from the matter title in the 'Search Criteria' field. If you chose "Matter List" as your Search Type, scroll through the list of matters to find the correct one.
4	After you have located the correct matter, double-click on it to navigate to that matter.

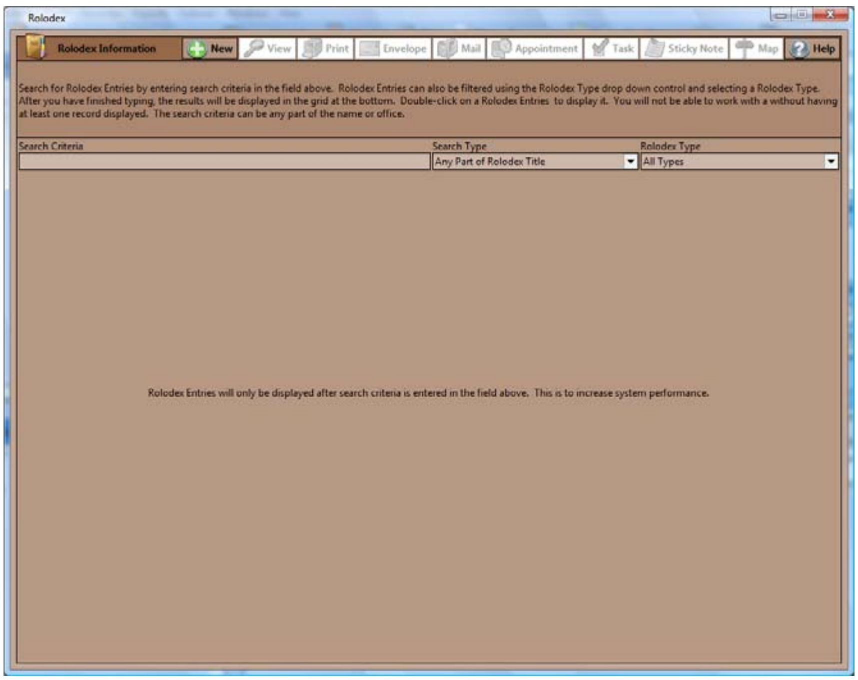
<u>Rolodex Search</u>

A matter search allows you to search through your matters (cases), while a Rolodex search allows you to search all Rolodex entries (clients, opposing counsel, medical providers, etc.).

Follow these steps to perform a Rolodex search.

Step	Task
1	Click on the 'Rolodex Search' button, located near the upper left corner of your screen.

Rolodex Search *(continued)*

<table>
<tr><th>Step</th><th>Task</th></tr>
<tr><td>2</td><td>Specify the search criteria you would like to apply to the search:
• Search Type – choose either "Any Part of Rolodex Title" to enter any character string from the party's first name, last name, or office/company/firm name or "Rolodex List" (which will display a list of all Rolodex entries)
• Rolodex Type – you may search all Rolodex types, or specify a certain type (e.g., SS Claimant, Medical Provider)

</td></tr>
<tr><td>3</td><td>If you chose "Any Part of Rolodex Title" as your Search Type, enter any character string from the party's first name, last name, or office/company/firm name in the 'Search Criteria' field. If you chose "Rolodex List" as your Search Type, scroll through the list of Rolodex entries to find the correct one.</td></tr>
<tr><td>4</td><td>After you have located the correct matter, you may
• double-click on the Rolodex entry to open the Rolodex entry window for the party or
• click once on the Rolodex entry, and a list of all matters to which the party is attached will display in the lower half of the window. To navigate to one of these matters, double-click on the matter title in the lower half of the window.</td></tr>
</table>

Deleting Rolodex Entries

In order to delete a Rolodex entry, you must first detach that entry from any matters to which it is attached.

Follow these steps to delete a Rolodex entry.

Step	Task
1	Click on 'Rolodex Search'.
2	Search for the appropriate entry, and double-click on it in the list of matching results to open the entry.
3	In the Rolodex entry, click on the Attached Matters tab (located at the bottom of the Rolodex entry window at the far right). A list of all matters to which the party is attached will appear.
4	Double-click on the first matter in the list of attached matters.
5	Click once in the party's name in the matter tree on the Matter tab.
6	Click on the 'Detach' button, located just above the matter tree (a paper clip icon with a red 'X').
7	Click on 'Detach' to confirm that you want to detach the party from the matter.
8	Return to the Rolodex entry, and repeat steps 4-7 for each matter listed on the Attached Matters tab.
9	After you have detached the party from all matters, return to the Rolodex entry for a final time, and click on 'Delete' at the top of the Rolodex entry window.

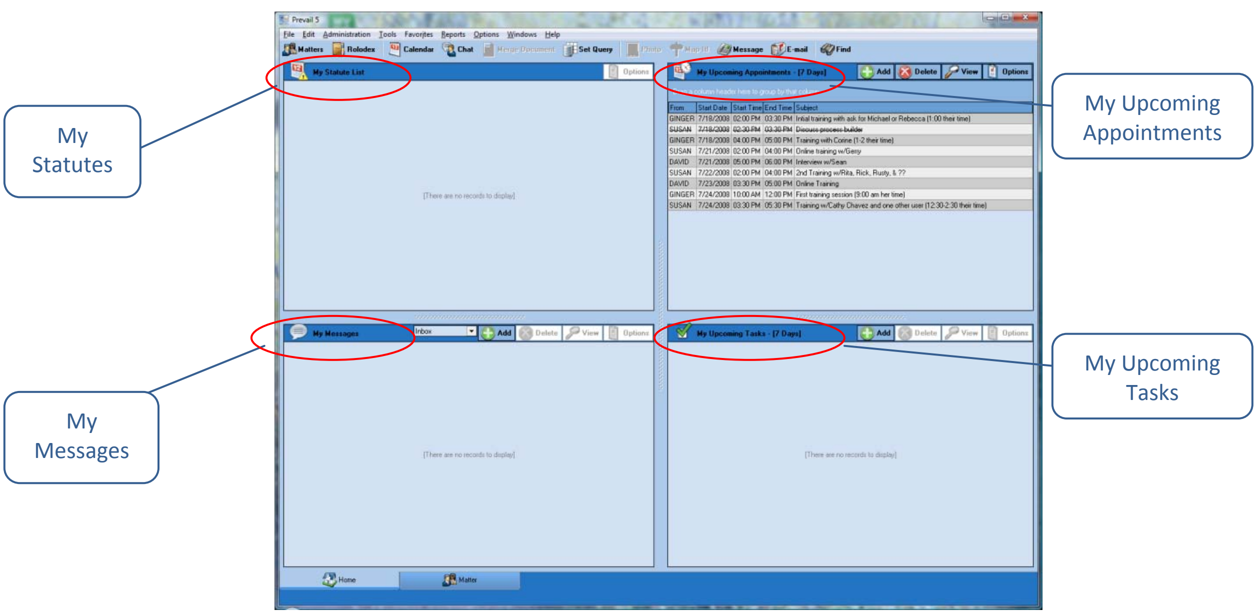
Chapter Seven: Tabs & Buttons

After you create your first matter, you will see several tabs at the bottom of the matter main screen. Most of these tabs are "matter-specific" (e.g., the information they contain pertains to the specific matter in which you are working); the Home tab, however, is "user-specific" (e.g., the information pertains to the specific user who is logged into Prevail).

Some of the matter-specific tabs (such as Medical and Events) appear regardless of the law type, while others vary depending on whether the matter is a personal injury, Social Security, or workers' compensation matter.

This chapter provides an explanation of the information displayed on and the tasks you can perform from each tab.

Home Tab



The Home tab is new to Prevail 5 and is the first tab you'll see when you log into Prevail. It is not matter-specific, but is user-specific. It will help you plan your day when you first log into Prevail!

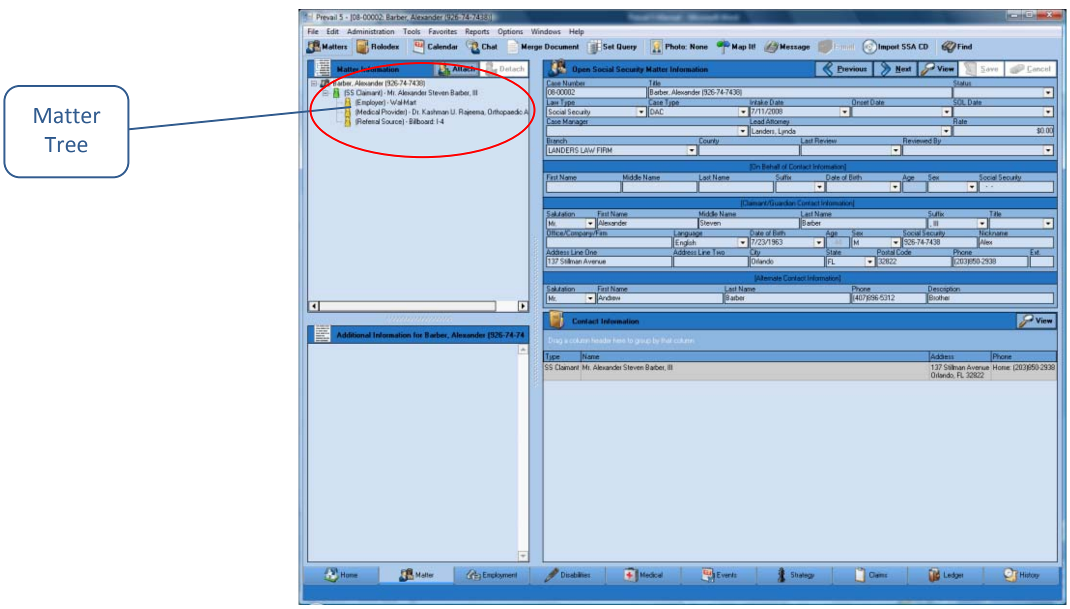
Home Tab *(continued)*

This tab is divided into four sections:

- My Statute List – a list of matters (for which you are the assigned Lead Attorney or Case Manager) with Statute of Limitations (SOL) dates upcoming within the next sixty days. *Note: Since Social Security matters do not have a specific "incident date" on which a SOL is based, Social Security matters do not appear in "My Statute List". Instead, statutes that occur within the life cycle of a Social Security matter will appear on your Prevail calendar in your task list.
- My Messages – a complete list of messages that other Prevail users have sent to you
- My Upcoming Appointments – a list of your appointments upcoming in the next seven days
- My Upcoming Tasks – a list of your tasks upcoming in the next seven days

Matter Tab

Here is a display of the Matter tab.



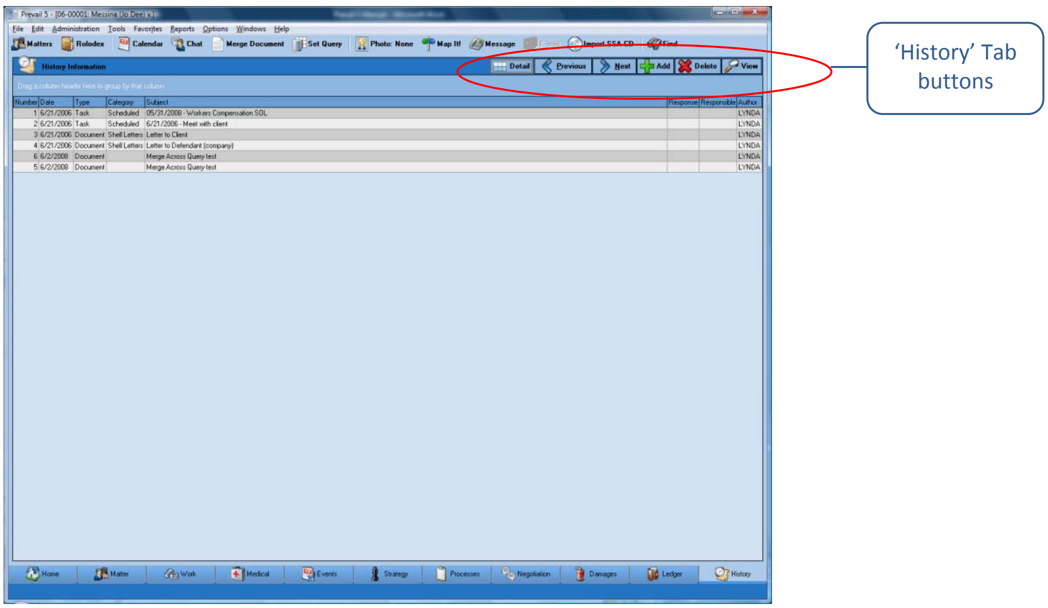
The Matter tab is the first tab you'll see when you navigate to a specific matter.

On the left side of this tab, you'll see the *matter tree*, which is a list of all of the parties attached to a matter. The first line of the matter tree is the matter title (i.e., case title). Underneath the matter title, you'll see a list of all parties involved in the case in any role (e.g., claimant, defendant, plaintiff, insurance company, medical provider, SSA office).

Matter Tab *(continued)*

On the right side of the screen, you'll see detailed information about the matter itself or the party that you have highlighted in the matter tree. If you need to update any information about any of the parties listed in the matter tree, you don't need to return to the Rolodex to do so. You may simply make the change(s) in the necessary field(s) on the Matter tab, and click 'Save' in the upper-right corner. Prevail will update the information in this matter, as well as in any other matters to which the party is attached *and* in the Rolodex!

History Tab



The History tab is one of the most important screens in Prevail. Regardless of what matter you're working on, this tab can answer the age-old question, "What's going on?" This page contains a complete chronology of everything that has taken place in the current matter, regardless of who did it, or where in Prevail it was done. Anything that takes place in Prevail has the ability to automatically copy to the History tab, including documents merged, scheduled and cancelled appointments, and scheduled and completed tasks.

While the system makes many entries automatically, you can also make History entries manually. For example, you may use the History tab to record notes from phone calls, e-mails, copy files saved outside of Prevail (which may include documents, photos, videos, etc.), copy e-mails from Microsoft Outlook, copy SSA exhibit CDs, or to scan documents (such as medical records) directly into Prevail. (In order to scan directly to Prevail, your scanner must be TWAIN-compatible.)

*Note: Manual entries are numbered <u>in the order in which they are entered</u>, not necessarily in the order in which the events occurred.

Adding History Entries

Prevail generates many History entries automatically, including new appointments or tasks, merged documents, ledger entries, etc. You also have the ability to manually create History entries.

Follow these steps to add a History entry.

Step	Task
1	From the History tab, click on the '+Add' button in the upper-right area of the screen. A 'New History Entry' window appears.
2	Enter a subject for the entry. *Note: Enter a subject that is fairly detailed, to make searching in History more powerful. The 'Subject' drop-down list contains the same choices as the 'Category' drop-down list. You may choose to use one of the drop-down choices, and then add more detail to the end of it.
3	If desired, change the 'Type' to reflect the type of History entry you are creating. *Note: 'Matter History' is the default 'Type'.
4	If desired, change the 'Entry Date' and 'Entry Time' of the entry. *Note: The 'Entry Date' and 'Entry Time' default to the current date and time.
5	If desired, enter the amount of time you spent on the task in the 'Time' field. (For example, if the entry is for time spent on a phone call with an insurance company adjuster, you may choose to enter the amount of time you spent on the phone call.) *Note: If you make a 'Time' entry, Prevail automatically creates a corresponding time entry in the matter's ledger.
6	If desired, enter a cost associated with the entry in the 'Cost' field. *Note: If you make a 'Cost entry, Prevail automatically creates a corresponding cost entry in the matter's ledger.
7	If desired, you may create a follow-up task for a user by entering a date in the 'Due Date' field. *Note: The 'Start Date' for the task is the current date.
8	If desired, choose a user from the 'To' drop-down list. The follow-up task will appear on the selected user's task list, beginning on the 'Due Date' you selected. *Note: If you set a 'Due Date' but do not select a 'To' user, Prevail automatically defaults to sending the task to the Case Manager's task list. The follow-up task will also appear on the Events tab for the matter.
9	Enter a brief description of the History entry in the memo field. *Note: Be as specific as possible in your description, since you want other users to be able to quickly ascertain what's happening in the case.

Adding History Entries *(continued)*

Step	Task
10	If desired, you may attach a file from an outside source using the 'File' field. a) To attach a file i. click on the paper clip button to the right of the 'File' field ii. navigate to the file's location on your computer and iii. double-click on the file to attach it to the History entry. b) To attach an entire folder of files i. click on the file folder button to the right of the 'File' field ii. navigate to the file folder's location on your computer and iii. double-click on the file folder to attach it to the History entry. c) To attach an email i. click on the envelope button to the right of the 'File' field i. highlight the appropriate email in your email folders that are displayed and ii. click 'Attach to History'. d) To attach a scanned document (when a TWAIN-compliant scanner is attached to your computer) i. click on the scanner button to the far right of the 'File' field ii. highlight the desired scanner and click 'Select' and iii. scan the document.
11	Click 'Save' in the New History Entry window to save your new entry to the History tab.

Generating a Merge Document for a Matter

After a Prevail user in your office with Administrator security rights has created templates (for more information on template creation, see *Creating Merge Document Templates in Prevail* on page 12) other Prevail users in your office will be able to quickly and easily generate merge documents for matters.

Generating a Merge Document for a Matter *(continued)*

Follow these steps to generate a merge document for a matter.

Step	Task
1	Click on the 'Merge Document' button on the Prevail toolbar.
2	The 'Document Merge Wizard' appears, displaying a complete list of all available merge documents. *Note: The Wizard will display generic documents, as well as documents that are specific to the type of matter you are working in. For example, if you are working in a Social Security matter, the Wizard will allow you to select from Generic & Social Security, Generic Only, or Social Security Only merge documents.
3	To narrow the list of available documents, enter any character string from the Document Title in the 'Document Search' field.
4	Highlight your desired document in the list of results, and click 'Next'. After Prevail builds the merge document information, a new window will appear.
5	Typically, you will leave the 'Merge Across Related' box *unchecked*. However, if your letter refers to a Rolodex type that is attached more than once to the matter (e.g., if the letter refers to a Medical Provider, and there is more than one Medical Provider attached to the client), you'll want to check the 'Merge Across Related' box. This feature allows you to choose multiple parties to merge the document for on the following screen.
6	Click 'Next'. • If you did not check 'Merge Across Related' on the previous screen, Prevail will build the document and display it in your word processing program upon completion of the merge. • If you did check 'Merge Across Related' on the previous screen, you will see a list of possible choices for whom to merge the letter. Click on one of the entries to select only one, or hold the <Ctrl> key down on your keyboard while clicking on multiple entries, if needed. Then, click 'Next'. After Prevail builds the document, it will display in your word processing program upon completion of the merge.
7	Make any necessary adjustments to the merge document, and then print it as you would normally print a document in your word processing program.

Generating a Merge Document for a Matter *(continued)*

Step	Task
8	Close the word processing program window. If you made any post-merge changes to the document, you will be prompted to save the changes you made. Click 'Yes'. *Note: The merged document will automatically be saved (with any changes you made after the merge) on the matter's History tab. Also, if there are time, cost, and/or task entries associated with the document in the Document Designer, Prevail will automatically record the appropriate entries on the matter's Ledger tab or calendar, as appropriate.

Power Search

Have you ever recalled doing something in a case (such as making note of an ailment on the Disabilities tab or recording an important fact on a Sticky Note), but you can't remember in *which* matter you made this notation? If so, you'll love Prevail's Power Search feature! It allows you to search for a character string within any of the tabs on Prevail, as well as within appointments, tasks, Rolodex entries, and Sticky Notes.
Prevail's Power Search provides the ability to search for a character string within any of the tabs, and also within appointments, tasks, Rolodex entries, and Sticky Notes.

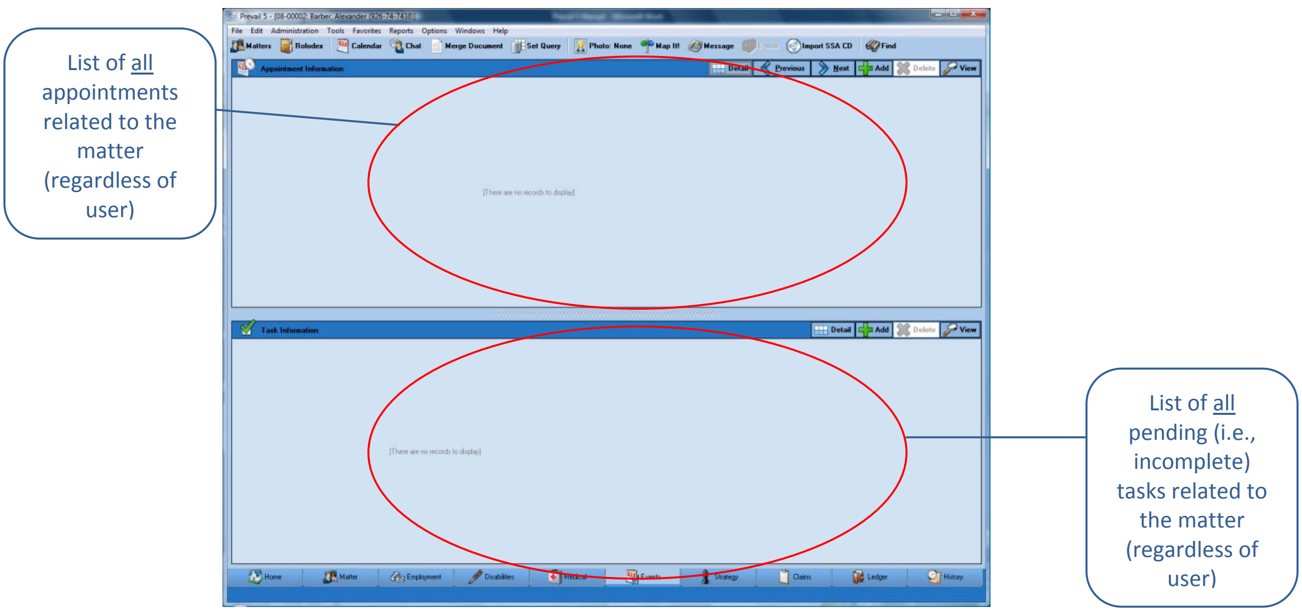
Follow these steps to use Prevail's Power Search.

Step	Task
1	Click on the 'Power Search' button in the Prevail Toolbar.
2	Enter any character string in the 'Search Criteria' field.
3	Choose the categories you would like to search within from the 'Search Type' drop-down list.
4	Double-click on the appropriate matter in the list of results to move directly to that matter.

Events Tab

The Events tab is like a "calendar within a calendar." As you know, your full Prevail calendar lists *all* appointments and tasks, related to all matters (or no matter at all, in the case of a personal appointment or task). The Events tab, on the other hand, displays only those appointments and tasks related to the specific matter in which you are working. On this tab, you may view, create, delete, cancel, or complete appointments or tasks just as if you were working in your full Prevail calendar.

The top half of the 'Events' screen displays *appointments* related to the matter, whether they have already taken place or are scheduled to take place in the future. The bottom half of the screen displays pending (i.e., incomplete) *tasks* related to the matter.



Events Tab *(continued)*

This table explains the purpose of each of the buttons located in the *Appointments* and *Tasks* sections of the 'Events' screen.

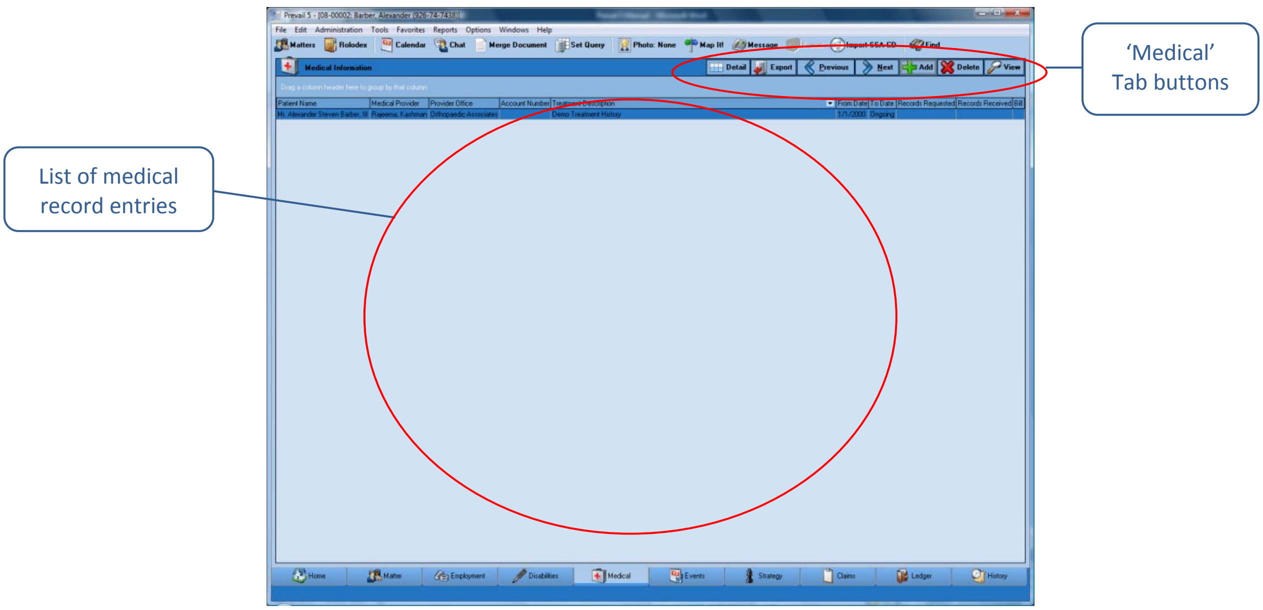
Button	Purpose
Detail	After highlighting a specific entry in the list of appointments (or tasks), click this button to switch back and forth between displaying and hiding details that have been entered about a specific appointment.
Previous or Next (only located in the *Appointments* – top half – of the 'Events' screen)	Click on these buttons to move to the previous or next matter in your database.
Add	Click this button to add a new appointment (or task) to the matter. The new appointment (or task) will also automatically appear on your calendar.
Delete	After highlighting the entry in the appointment list you want to delete, click this button to delete the appointment (or task). The appointment (or task) will also automatically be removed from your calendar. *Note: In Prevail, there is a difference between "deleting" or "cancelling" an appointment. If you delete an appointment, all traces of it will be removed from your calendar, the Events tab, and the History tab. On the other hand, if you "cancel" the appointment, it will remain on the calendar and Events tab (with a strikethrough notation), and an entry for a cancelled appointment will be made automatically on the History tab. We recommend that you only delete an appointment if you created it by mistake, so that you can retain a record of cancelled appointments.
View	After highlighting a specific entry in the list of appointments (or tasks), click this button to view the Appointment or Task window for the entry.

*Note: You may also right-click on an appointment or task on the Events tab to quickly cancel, delete, or complete it.

Medical Tab

The Medical tab contains a list of all medical providers attached to a matter, as well as detailed treatment information, including reason for treatment, dates of service, dates medical records copies were requested and received, and payment information (recorded as a cost or damage entry). When you attach a medical provider to a client on the Matter tab, Prevail automatically creates an entry for that provider on the Medical tab, as well.

Here is a display of the Medical tab. The lower part of this tab displays a complete list of all medical records that have been entered in the system for the matter.



Medical Tab *(continued)*

There are several buttons located in the top right portion of this tab. The table below describes the purpose of each of these buttons.

When you click on this button…	You will…
Details	see detailed medical records that you have input about the entry that is highlighted in the list.
Export	export data to a comma-delimited (.csv) file.
Previous	move to the matter tab (main screen) of the matter that is alphabetically just prior to the matter you are currently viewing medical information for.
Next	move to the matter tab (main screen) of the matter that is alphabetically just after the matter you are currently viewing medical information for.
Add	see a new medical record entry window. See *Adding a Medical Record* below for more details about adding a new record.
Delete	delete the medical record that is currently highlighted in the list.
View	open the medical record entry window for the record that is currently highlighted in the list. From this window, you can make additions or deletions to the record or delete the record entirely. *Note: You can also view the medical record by highlighting and double-clicking on it from the list of medical records.

<u>Requesting the Initial Set of Records from a Medical Provider</u>

As previously mentioned in this section, when you attach a medical provider to a client on the Matter tab, the medical provider will also appear on the Medical tab. As you're attaching the medical provider, you will see a window prompting you to input the reason for treatment ("subject"), dates of service ("from" and "to" dates), and records requested/received dates. At that point, you will probably only be able to complete the reason for treatment and dates of service.

Requesting the Initial Set of Records from a Medical Provider *(continued)*

When the time comes to request an initial set of records from a provider, follow the steps below to update that provider's entry on the Medical tab.

Step	Task
1	Double-click on the appropriate provider's entry on the Medical tab. Make sure that the "subject" and "from" and "to" dates are completed. *Note: If treatment is ongoing, you may choose to simply type "present" or "ongoing" in the "to" date field.
2	Enter the date that you are requesting records in the 'Records Requested' field.
3	Click 'Save'.
4	When you receive the initial set of records, follow these steps to input the appropriate information: • enter the 'Records Received' date • if necessary, update the "from" date. For example, if you originally entered the word "present" or "ongoing," you'll want to look through the records and determine the last date of service referenced in that particular set of records. • if you had to pay for the copies of the records, enter the amount you paid in the 'Bill' field, and check the box that says 'Add to Costs'; alternatively, if your client had to pay any amount to this provider, you may enter that amount in the 'Bill' field, and check the box that says 'Add to Damages'. Cost entries will automatically transfer to the Ledger, and Damages entries will automatically transfer to the Damages tab (in personal injury and workers' compensation matters). • enter a summary of the records in the 'Detail' area. • if you have a TWAIN-compatible scanner, you may scan the records into Prevail by clicking on the scanner button in the upper-right area of the window. Upon completion of the scan, the scanned image will be saved on the matter's History tab.
5	Click 'Save'.

Requesting an Updated Set of Records from a Medical Provider

If you need to request a later set of records from a provider who is already listed on the Medical tab, you'll need to create a new entry for that medical provider on the Medical tab. (In other words, don't attach the medical provider again on the Matter tab, and don't modify the provider's existing entry on the Medical tab!)

Requesting an Updated Set of Records from a Medical Provider *(continued)*

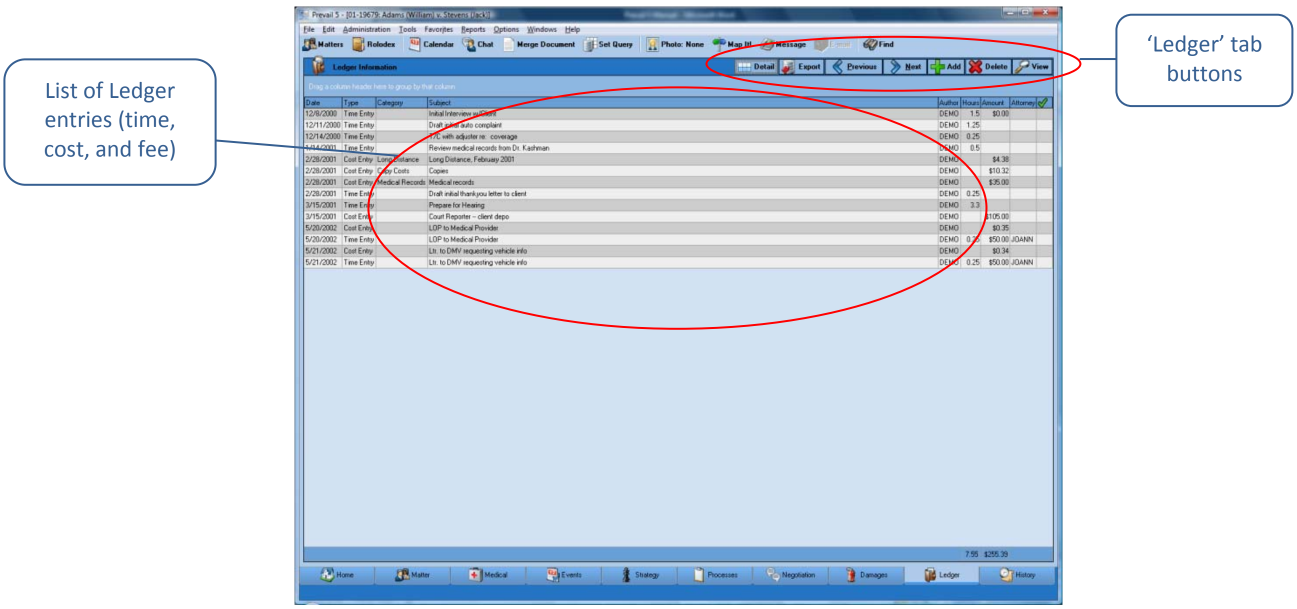
Follow these steps to add a new entry for a medical provider on the Medical tab (when you're preparing to request an updated set of records).

Step	Task
1	Click on the green '+Add' button in the upper-right area of the Medical tab.
2	Click on the paper clip button, the second button located to the right of the 'Specialty' field. A Rolodex search window will appear, with the search already filtered to only look for medical providers.
3	Enter any character string from the medical provider's last or first name.
4	Double-click on the appropriate medical provider's entry in the list of results, which will return you to the medical record entry window with the provider attached.
5	Enter the reason for treatment with this medical provider (e.g., spinal adjustment) in the 'Subject' field.
6	Refer back to the records that you *already* have in your possession from this medical provider to determine the new 'From' date. For example, if the 'To' (ending) date on the prior set of records was 11/1/2008, you'll want to make the 'From' date on this new entry 11/2/2008, so that you don't have overlapping dates.
7	Enter the date that your client *stopped* treating with this medical provider in the 'To' field. *Note: If treatment is ongoing, you can enter "present" or "ongoing" in the 'To' field.
8	Choose the date that you requested records from this medical provider in the 'Records Requested' field.
9	Click 'Save'.
10	*After* you receive records from this provider at a later date, follow steps 4-5 from the *Requesting the Initial Set of Records from a Medical Provider* procedure on page 55 to enter the necessary information.

Ledger Tab

Since you have invested countless hours and incurred various costs in a matter, you'll obviously want to track your time, costs, and/or fees on Prevail's Ledger tab. When used properly, this tab can help you generate several useful accounting reports – such as reports of outstanding monies due and invoices that you can print and send to clients.

Entries can automatically be sent to the Ledger from various screens within Prevail, such as merge documents (see page Creating Merge Document Templates in Prevail12 for details), the Medical tab (see page 54), and the History tab (see page 47).



You'll keep track of all time, cost, and fee entries with the Ledger tab. This table explains the purpose of each of the buttons located on the Ledger.

Button	Purpose
Detail	After highlighting a specific entry in the list of ledger entries, click this button to switch back and forth between displaying and hiding detailed notes that have been entered about the entry.
Export	Click this button to export the data on the Ledger to an Excel comma-delimited (.csv) spreadsheet in which you may enter data to be exported to an alternate accounting program that accepts .csv files. The resulting .csv file will automatically be saved on the matter's History tab.
Previous or Next	Click these buttons to move to the previous or next matter in your database.
Add	Click this button to add a new time, cost, or fee entry to the matter.
Delete	After highlighting the entry in the list to delete, click this button to delete the ledger entry.

Ledger Tab *(continued)*

Button	Purpose
View	After highlighting a specific entry in the list of ledger entries, click this button to view the detailed time, cost, or fee entry window. Alternatively, you may double-click on a Ledger entry to open it.

Adding a Cost Entry

Follow these steps to create a new cost entry.

Step	Task
1	Click on the '+Add' button on the Ledger tab. A 'New Ledger Entry' window appears.
2	Click on the 'Type' drop-down list, and choose "Fee".
3	Click on the 'Category' drop-down list, and select a category for the new entry.
4	Enter a description of the new entry in the 'Subject' field.
5	Click on the 'Attorney' drop-down list to select the appropriate attorney for the entry.
6	Enter the amount of the cost in the 'Amount' field.
7	Enter the date you billed the client for reimbursement in the 'Billed On' field. *Note: You may enter the date manually or use the drop-down arrow to display a calendar from which you may pick the date.
8	Enter the invoice # on the bill that you sent to your client in the 'Invoice #' field.
9	To enter the name of the party you paid in the 'Pay to the Order of' field, click on the paper clip icon to the right of the field to open a Rolodex search window. Then, search for the party in the Rolodex, and double-click on the appropriate name in the result list to attach to the Ledger entry. If the party doesn't yet exist in your Rolodex, click on the 'New' button at the top of the Rolodex search window to create a new Rolodex entry.
10	Enter your firm's check # in the 'Check #' field.
11	If desired, enter any notes relevant to the entry in the text field at the bottom of the window.
12	Click 'Save'.

Adding a Cost Entry *(continued)*

Step	Task
13	When you receive payment against a particular ledger entry in the future, double-click on the entry in the Ledger tab. Then, click in the 'Reconciled On' checkbox, and enter the date you received payment, or click on the drop-down arrow to display a calendar from which you may choose the payment date. *Note: When you receive a payment, in addition to reconciling the original entry, you may choose to create a negative entry on the Ledger tab, in order to have an accurate balance due displayed at the bottom of the Ledger tab. To create a payment entry, follow steps 1-12 above, as appropriate, and simply make the 'Amount' negative by typing a "-" sign in front of it.

Adding a Fee Entry

Follow these steps to create a new fee entry.

Step	Task
1	Click on the '+Add' button on the Ledger tab. A 'New Ledger Entry' window appears.
2	Click on the 'Type' drop-down list, and choose "Time".
3	Click on the 'Category' drop-down list, and select a category for the new entry.
4	Enter a description of the new entry in the 'Subject' field.
5	If desired, click on the 'Attorney' drop-down list to select the appropriate attorney for the entry.
6	Enter the date you billed for this entry in the 'Billed On' field. *Note: You may enter the date manually or use the drop-down arrow to display a calendar from which you may pick the date.
7	Enter your firm's invoice # in the 'Invoice #' field.
8	If desired, enter any notes relevant to the entry in the text field at the bottom of the window.
9	Click 'Save'.

Adding a Fee Entry *(continued)*

Step	Task
10	When you receive payment against a particular ledger entry in the future, double-click on the entry in the Ledger tab. Then, click in the 'Reconciled On' checkbox, and enter the date you received payment, or click on the drop-down arrow to display a calendar from which you may choose the payment date. *Note: When you receive a payment, in addition to reconciling the original entry, you may choose to create a negative entry on the Ledger tab, in order to have an accurate balance due displayed at the bottom of the Ledger tab. To create a payment entry, follow steps 1-12 above, as appropriate, and simply make the 'Amount' negative by typing a "-" sign in front of it.

*Note: Some Prevail users choose to enter a "fee estimate" when they know that a fee is due, but are unsure of the exact amount. To do this, create a new entry using the procedure above, and assign the category "Fee Estimate". (For instructions on how to create a fee category, see *Modifying Lists in the Databank* on page 24). Then, when you receive the fee award notice, re-open this Ledger entry, and modify the 'Amount' and 'Category' fields.

Adding a Time Entry

Follow these steps to create a new time entry.

Step	Task
1	Click on the '+Add' button on the Ledger tab. A 'New Ledger Entry' window appears.
2	Click on the 'Type' drop-down list, and choose "Time".
3	Click on the 'Category' drop-down list, and select a category for the new entry.
4	Enter a description of the new entry in the 'Subject' field.
5	If desired, click on the 'Attorney' drop-down list to select the appropriate attorney for the entry.
6	Enter an hourly rate for the time entry. *Note: If you have an hourly rate already set up in your Prevail Employee setup for the selected attorney, this hourly rate will automatically display.
7	Enter the number of hours spent in the 'Hours' field. *Note: If you are entering the ledger entry as you are actually performing the task, you may click on the clock icon when you start the task, and click on it again when you finish the task. Then, Prevail will automatically calculate the amount of time spent and populate the 'Hours' field.

Adding a Time Entry *(continued)*

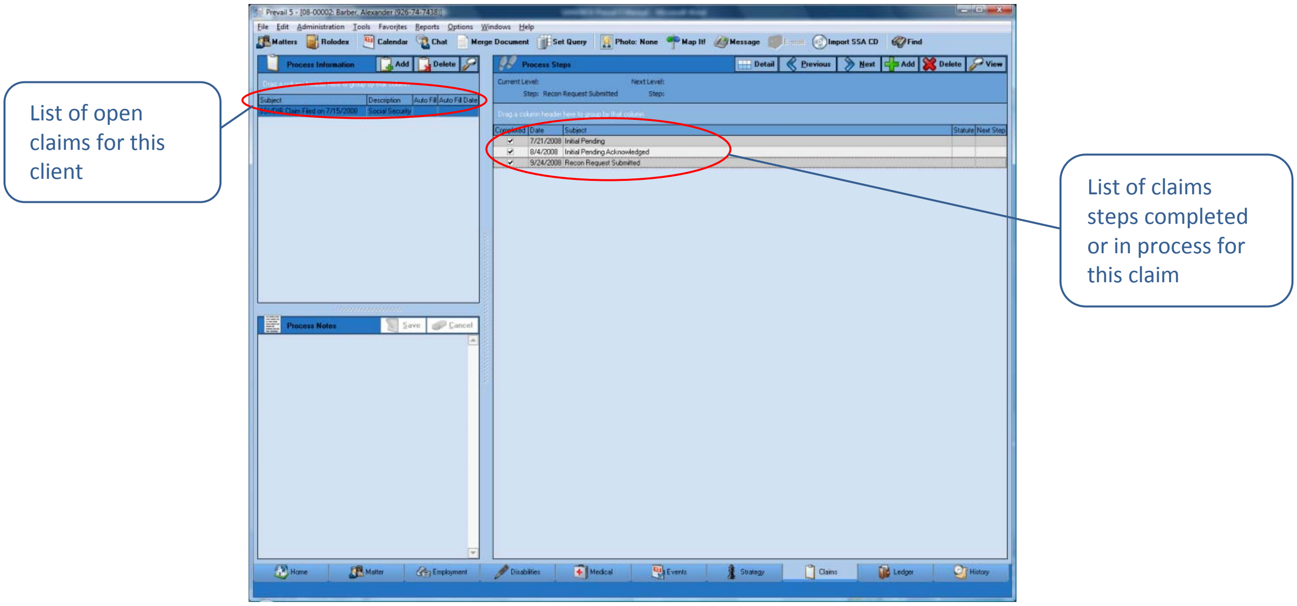
Step	Task
8	The 'Amount' field will automatically populate. Simply review the amount to make sure it is correct.
9	Enter the date you billed for this entry in the 'Billed On' field. *Note: You may enter the date manually or use the drop-down arrow to display a calendar from which you may pick the date.
10	Enter your firm's invoice # in the 'Invoice #' field.
11	If desired, enter any notes relevant to the entry in the text field at the bottom of the window.
12	Click 'Save'.
13	When you receive payment against a particular ledger entry in the future, double-click on the entry in the Ledger tab. Then, click in the 'Reconciled On' checkbox, and enter the date you received payment, or click on the drop-down arrow to display a calendar from which you may choose the payment date. *Note: When you receive a payment, in addition to reconciling the original entry, you may choose to create a negative entry on the Ledger tab, in order to have an accurate balance due displayed at the bottom of the Ledger tab. To create a payment entry, follow steps 1-12 above, as appropriate, and simply make the 'Amount' negative by typing a "-" sign in front of it.

Claims/Processes Tab

*Note: This tab is labeled "Claims" when you're working in a Social Security matter, and it's labeled "Processes" when you're working in any other type of matter. Since Social Security matters follow essentially the same path regardless of jurisdiction, Prevail has a built-in process for Social Security matters. For all other matters (e.g., Personal Injury, Workers' Compensation), you'll need to build the steps using the Process Builder. For more information on creating and modifying processes using the Process Builder, see *Process Builder* on page 25.

For the purposes of this section, we'll limit our discussion to the built-in Social Security process that you'll see when you're working in a Social Security matter.

Claims/Processes Tab *(continued)*



Prevail can store up to three claims simultaneously on the Claims tab. It's not uncommon to have one claim at the Appeals Council level, and then re-file at the initial level. Prevail will track both claims simultaneously. The claim descriptions of the claims will appear in the narrow window on the left side of the screen. When you click on a claim description in that window, the corresponding history for that claim will be displayed on the right side of the screen.

Creating a New Claim on the Claims Tab

Follow these steps to create a new claim on the Claims tab.

Step	Task
1	Click on the 'Add' button on the left side of the screen. A 'New Process for Matter' window appears.
2	Enter a description of the claim in the 'Subject' field. *Note: You may simply enter "Claim 1," "Claim 2," etc., or you may enter a more specific description of the claim (e.g., "SSD Claim Filed on 7/22/2008".
3	Choose "Social Security" from the 'Process' drop-down list.
4	Click 'Save & Close'. The new claim now appears in the list of claims on the left side of the screen.

<u>Updating the Status of a Claim on the Claims Tab</u>

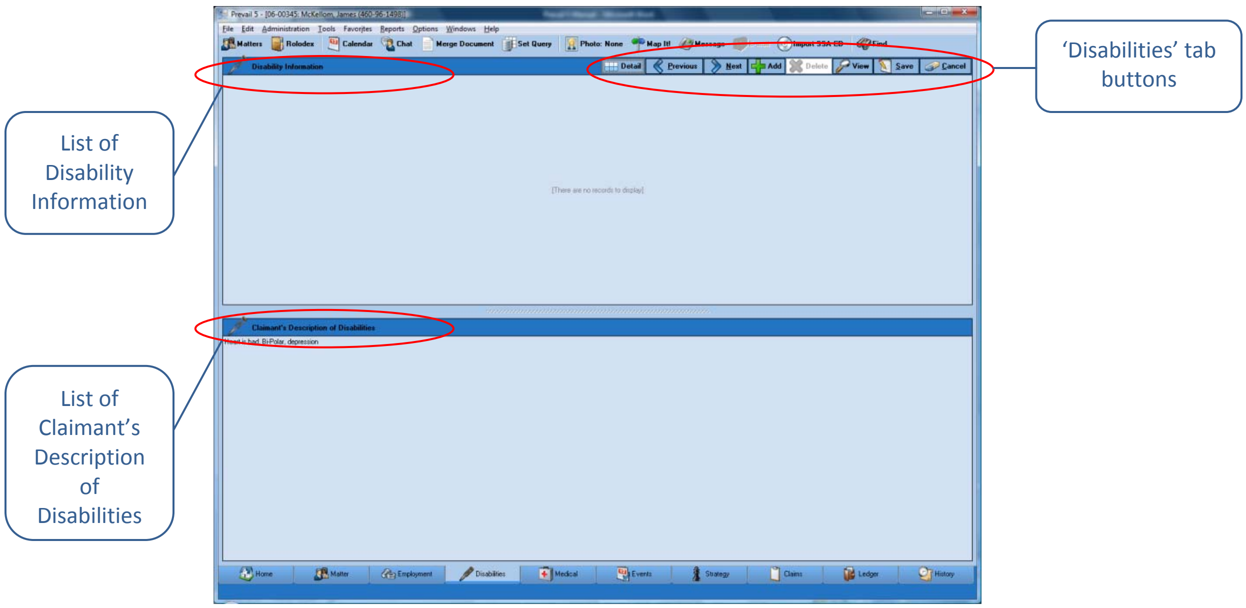
Follow these steps to update the status of a claim on the Claims tab.

Step	Task
1	Click on the appropriate claim in the list of claims on the left side of the screen.
2	Click on the '+Add' button on the right side of the screen. A 'Select Next Step' window appears.
3	Choose the appropriate level (e.g., Initial Application, Appeals Council) from the 'Level' drop down-list in the middle of the window. *Note: By choosing the appropriate level, your list of choices for the next step will be filtered to include *only* those steps that belong at the chosen level.
4	Click on the appropriate step from the list of steps at the bottom of the window.
5	Edit the 'Entry Date & Time' field at the top of the window, as necessary. *Important Note: It is *extremely* important to enter the date printed on the actual notice from the SSA, particularly in the case of a denial notice, since Prevail will automatically calculate your Statute of Limitations (SOL) date based on this entry date. Prevail will schedule statute warning tasks on your task list accordingly.
6	If the step results in a statute of limitations (e.g., the step involves a denial of benefits by the SSA), the statute warning task will default to the Case Manager's task list. (Note: If a Case Manager is *not* assigned to the matter, the statute warning task will default to the current user's task list.) If you want the statute warning task to appear on a *different* task list, choose the appropriate user from the 'Responsible' drop-down list.
7	Click 'Save & Close'.

*Note: It is possible to set fields on the Matter tab (e.g., 'Case Status') to automatically update when a step is entered on the Claims tab. Please call our training department for instructions on how to establish this link between the Claims tab and the Matter tab.

Disabilities Tab

<u>*Note: The Disabilities tab only appears when you're working in a Social Security matter. You won't see this tab if you're working in any other type of matter.</u>



You'll record information about the claimant's disabilities and the client's description of his or her disabilities on the Disabilities tab. Record *objective* information (facts and details backed up by medical evidence) in the "Disability Information" section (top half) of the screen, and record *subjective* information (a description of the claimant's disabilities in his or her own words) in the "Claimant's Description of Disabilities" section (bottom half) of the screen.

Button	Purpose
Detail	After highlighting a specific entry in the Disability Information list (top half of the screen), click this button to switch back and forth between displaying and hiding detailed notes that have been entered about the entry.
Previous or Next	Click these buttons to move to the previous or next matter in your database.
Add	Click this button to add an entry to the Disability Information list to the matter.
Delete	After highlighting an entry in the Disability Information list, click this button to delete the entry.
View	After highlighting an entry in the Disability Information list (top half of the screen), click this button to view the disability entry window for the entry. *Note: Alternatively, you may open the disability entry window by double-clicking on the item in the Disability Information list.

Disabilities Tab *(continued)*

Button	Purpose
Save	Click this button to save any changes you make to the Claimant's Description of Disabilities section (lower half of the screen).
Cancel	Click this button to cancel any changes you make to the Claimant's Description of Disabilities section (lower half of the screen).

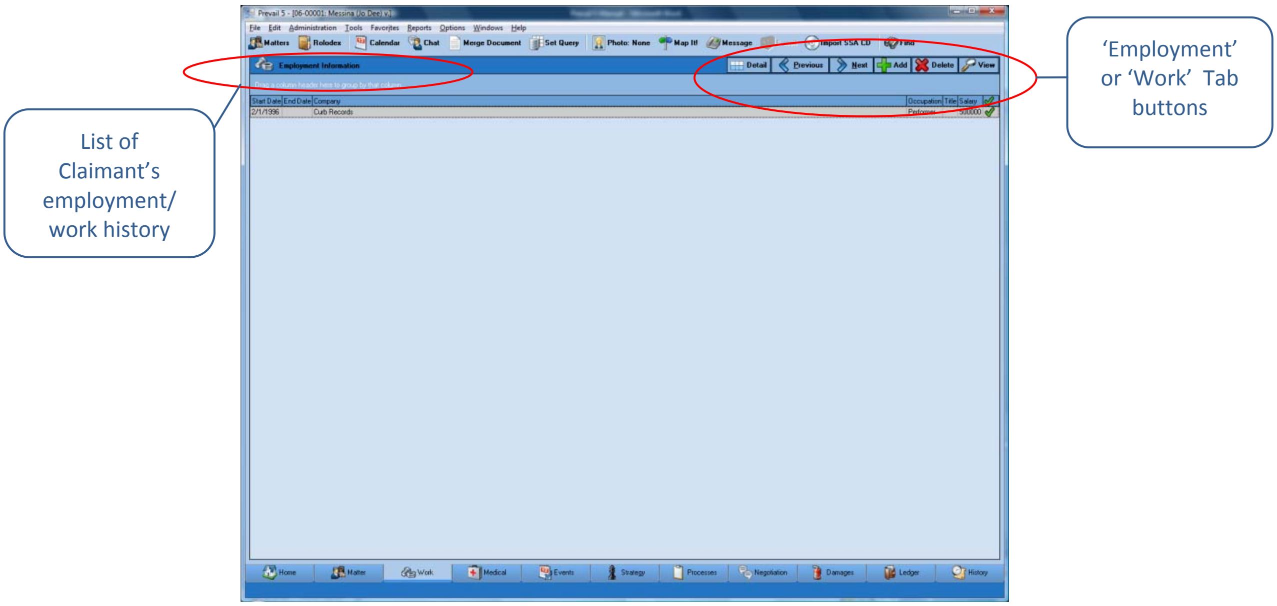
Adding Ailments to Disability Information

The top half of the Disabilities tab is reserved for ailments specifically diagnosed by a medical provider. To insert an ailment in this section, click on the 'Add' button at the top of the Disabilities window. Then, complete the fields in the Disability window with the following information.

Field	Description
Ailment	Choose the appropriate ailment from the drop-down list. (Our pre-loaded list of ailments contains approximately 180 ailments. If you would like to add other options to the list, follow the steps outlined in *Modifying Lists in the Databank* on page 24.
Severity	Your office should choose how you would like to classify the severity of an ailment. Many offices choose to use a scale of 1-5 (with 5 being most severe). By using a numerical scale, you'll be able to sort and filter the information in this section in a meaningful way. (For more information on sorting and filtering, see *Grid Layout* on page 91.) Whatever method you choose, make sure your users are *consistent*!
Duration	Enter the length of time your client has suffered from this ailment.
Work Load	Your Office should choose how to describe work load. Many offices use terms such as "sedentary," "light duty," etc. Again, regardless of the method you use, just be *consistent*!
Treatment	Describe the treatment that the medical provider is rendering for this specific ailment.
Detail	Add any other details not already explained in the other fields in the Disability window.

Employment/Work Tab

*Note: This tab appears only when you're working in a Workers' Compensation matter.



In a workers' compensation matter, it is vital to keep track of your client's work history, so that you'll have easy access to information regarding salary, job duties, dates of employment, and work load. This data will undoubtedly help you as you build your case to win benefits for an injured employee.

Adding an Employment/Work Entry

When you attach an employer to the workers' compensation claimant in the matter tree on the Matter tab, Prevail also automatically enters that employer's information on the Employment/Work tab. During the attachment procedure, you have the opportunity to input employment information (such as dates of employment), or you can simply attach the employer, and return to the Employment/Work tab later to add other details.

Follow these steps to manually add entries to the claimant's employment history.

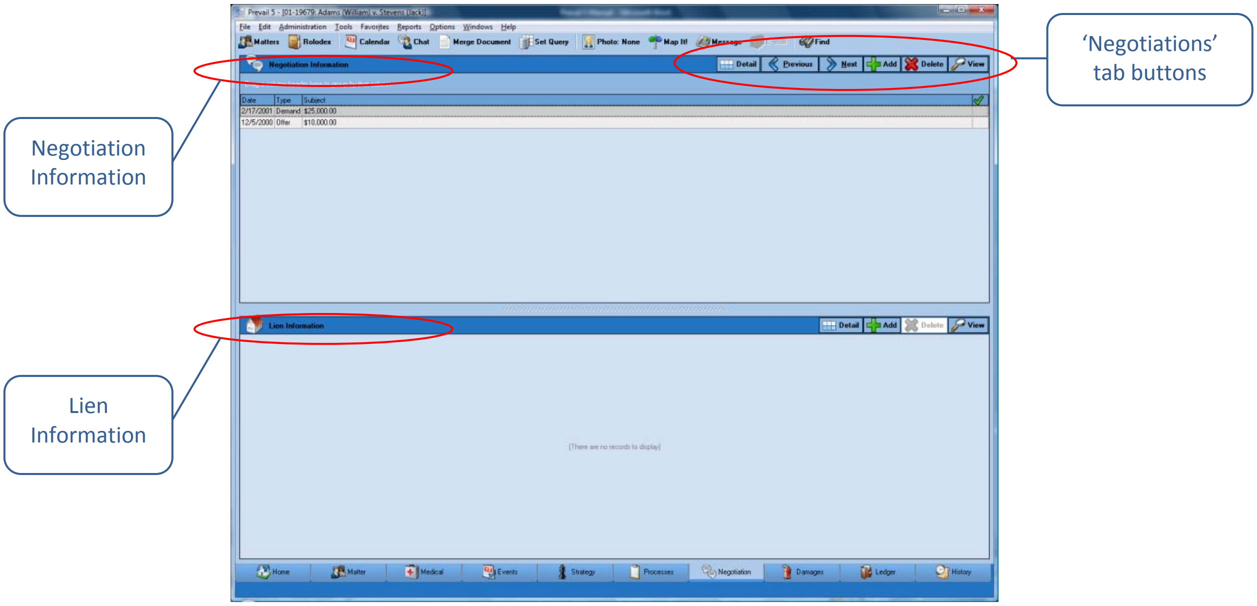
Step	Task
1	Click on the '+Add' button on the right side of the screen. A 'New Employment History' window appears.
2	Click on the paper clip button, which is located to the right of the 'Employer' field. A Rolodex search window appears.

<u>Adding an Employment/Work Entry *(continued)*</u>

<table>
<tr><th>Step</th><th>Task</th></tr>
<tr><td>3</td><td>Enter any character string from the employer’s name in the ‘Search Criteria’ field.
*Note: Sometimes, you may not know the specific employer's name. You may simply know the occupation that your client has held at "various" places over the years. If this situation applies, you'll still need to attach an employer to the client. Simply use Step 4 below to create or use an existing Rolodex entry for an employer with the name "Unknown Employer".</td></tr>
<tr><td>4</td><td>• If the employer appears in the list of results, double-click on the employer’s entry to attach the employer to the matter.
• If the employer does not appear in the list of results, then
a) click on the ‘+New’ button at the top of the window. A ‘Rolodex Entry’ window appears.
b) enter the employer’s information in the ‘Rolodex Entry’ window, and click ‘Save’. You’ll return to the Rolodex search window, and the employer will now display in the list of results.
c) double-click on the employer’s name in the list of results.</td></tr>
<tr><td>5</td><td>If desired, enter the appropriate information in the remaining fields in the ‘New Employment History’ window:
• Occupation – the type of work the client performed
• Title – the official title the client held
• Start Date – beginning date of employment
• End Date – ending date of employment (if not currently working for this employer)
• Current Employer – click in the checkbox if the employer is the claimant’s current employer.
• Salary – may be entered as an hourly, weekly, or annual rate
• Work Load – your office should decide how to classify work load. Many of our clients use terms such as sedentary, light duty, full duty, etc.
• Duties – enter a brief description of the client's duties at this occupation.
• Detail – enter more detailed information about the client's position with this particular employer.</td></tr>
<tr><td>6</td><td>Click ‘Save’.</td></tr>
</table>

Negotiation Tab

*Note: The Negotiation tab appears only when you're working in a Personal Injury or a Workers' Compensation matter.



You'll use the Negotiation tab to record offers and demands that are made as you attempt to settle a case out of court. You'll also use this tab to track any liens that are held against a potential settlement.

Adding Demands and Offers

Follow these steps to add a demand or offer entry to the Negotiation tab.

Step	Task
1	Click on the '+Add' button in the upper-right area of the screen. A 'New Negotiation Entry' window appears.
2	Choose the date the demand or offer was made from the 'Date' drop-down list by • manually entering the date or • clicking on the drop-down arrow and selecting the for the entry.
3	Enter a brief description of the entry in the 'Subject' field. *Note: Many clients choose to enter the amount of the demand or offer as part of the 'Subject' line so that it is easily visible on the Negotiation tab.
4	If the demand or offer is final, click in the checkbox for 'Final'.
5	If desired, enter detailed information about the entry in the text field at the bottom of the window.

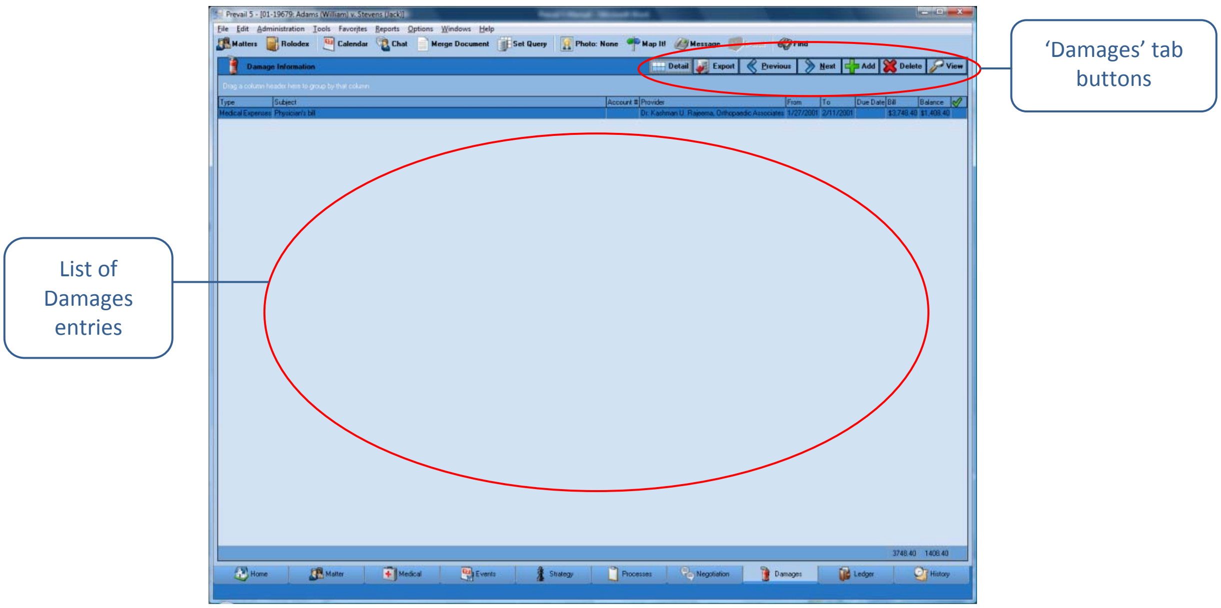
Adding Liens

Follow these steps to add a lien entry on the Negotiation tab.

Step	Task
1	Click on the '+Add' button in the Lien Information section of the tab (lower half of the screen).
2	In the lien entry window, enter a brief description of the lien in the 'Subject' field.
3	Enter the date of the lien in the 'Date' field (either by typing the date or choosing it from the drop-down calendar).
4	Attach the lienholder in the 'Provider' field: a) click on the paper clip to the right of the 'Provider' field b) search for the provider's name in the Rolodex c) if the provider's name appears in the list of search results, double-click on it to attach it to the lien entry, <u>or</u> if the provider's name does *not* appear in the list of search results, click on the 'New' button at the top of the Rolodex search window to add the provider to your Rolodex, and then double-click on it to attach it to the lien entry.
5	Enter a policy number, insured amount, and paid amount in the appropriate fields.
6	If a lien notice has been received, check the 'Received notice' box.
7	Enter any additional details, as desired, in the memo field in the lower half of the lien entry window.
8	Click 'Save'.

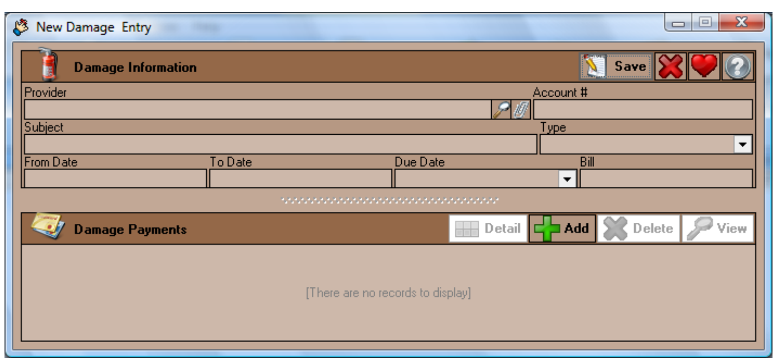
Damages Tab

<u>*Note: This tab appears only if you're working in a Personal Injury or Workers' Compensation matter.</u>



You'll use the Damages tab to record special damages (such as medical bills, lost wages, pain & suffering, and property damage), as well as payment history against any of those damages. As you proceed through negotiation and a possible trial, you'll want to ensure that your settlement is sufficient to cover the damages that your client has incurred.

Adding Damages Entries



Adding Damages Entries *(continued)*

Follow these steps to add a damage entry or payment against a damage entry.

Step	Task
1	Click on the '+Add' button in the upper-right area of the screen. A 'New Damages Entry' window appears.
2	Attach the provider in the 'Provider' field: a) click on the paper clip to the right of the 'Provider' field b) search for the provider's name in the Rolodex c) if the provider's name appears in the list of search results, double-click on it to attach it to the damage entry, <u>or</u> if the provider's name does *not* appear in the list of search results, click on the 'New' button at the top of the Rolodex search window to add the provider to your Rolodex, and then double-click on it to attach it to the damage entry.
3	Enter the account number for the provider in the 'Account #' field.
4	Enter a brief description of the bill/damage in the 'Subject' field.
5	Select a damage type from the 'Type' drop-down list.
6	Enter the starting date of service for the provider in the 'From' field and the ending date of service in the 'To' field.
7	Enter the due date of the bill in the 'Due Date' field by • manually entering the date or • clicking on the drop-down arrow next to the 'Due Date' field and selecting the date from the calendar display.
8	Enter the amount of the bill/damage in the 'Bill' field.
9	• If you don't have a payment to apply to the new damage entry, click 'Save'. You have finished setting up the new damage entry. • If you have a payment entry to apply to the new damage entry, click on the 'Add' button in the 'Damage Payments' section at the lower half of the 'New Damage Entry' window. A 'New Payment Entry' window appears. Continue to step 10 of this procedure.
10	Attach the payer in the 'Provider' field: a) click on the paper clip to the right of the 'Provider' field b) search for the payer's name in the Rolodex c) if the payer's name appears in the list of search results, double-click on it to attach it to the damage entry, <u>or</u> if the payer's name does *not* appear in the list of search results, click on the 'New' button at the top of the Rolodex search window to add the payer to your Rolodex, and then double-click on it to attach it to the damage entry.

Adding Damages Entries *(continued)*

Step	Task
11	Enter the payer's account number in the 'Account #' field.
12	Enter a brief description of the payment entry in the 'Subject' field.
13	Enter the payment date in the 'Payment' field by • manually entering the date or • clicking on the drop-down arrow next to the 'Payment Date' field and selecting the date from the calendar display.
14	Enter the amount of the payment in the 'Bill' field.
15	If desired, enter detailed notes about the payment in the text field at the bottom of the 'New Payment Entry' window.
16	Click 'Save'.

*Note: You may return to an existing damage entry at any time to apply a payment. Simply double-click on the damage entry on the Damages tab, and follow steps 9-16 in the *Adding Damages Entries* procedure.

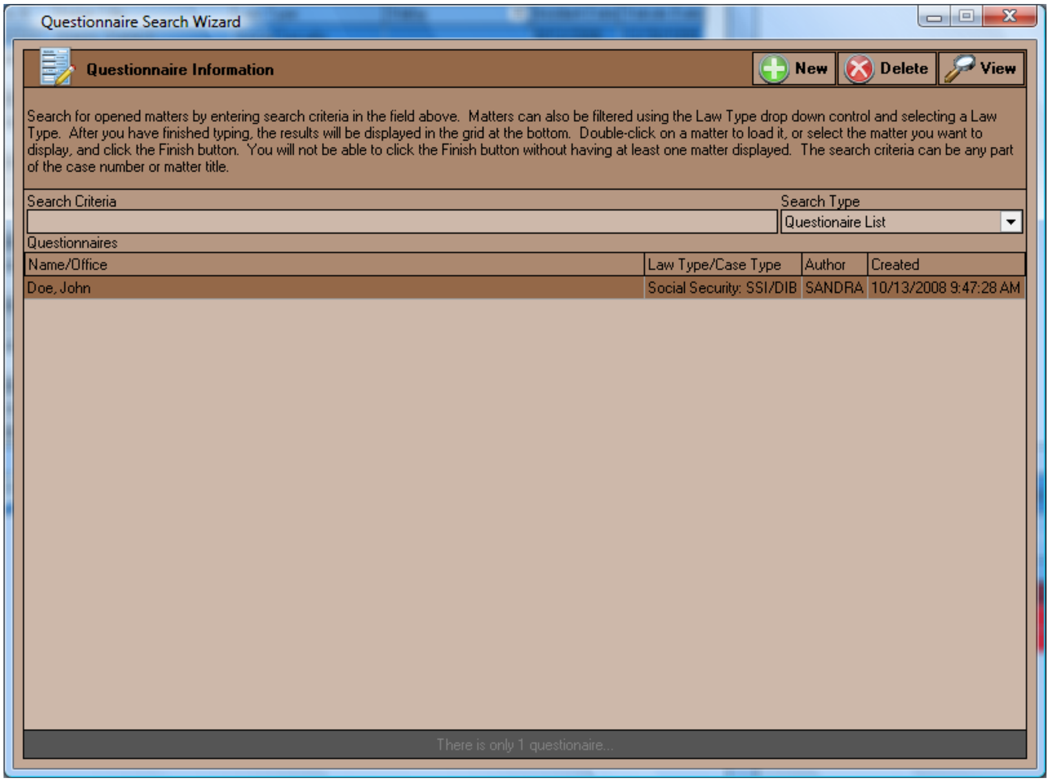
Strategy Tab

During the course of a case, attorneys obtain information that may be useful in the future as they prepare their overall strategy for winning. The Strategy tab is a useful tab for recording notes about this strategy. To enter strategy notes on this tab, simply start typing. You'll notice that the window turns yellow when you start making changes. When you're finished, either click 'Save' to save the updated information, or click 'Cancel' if you don't want to save your changes.

Generating an Intake Questionnaire for a New Prospect

The Intake Questionnaire is a new feature in Prevail 5. It allows you to follow a user-defined script of questions (see *Creating a New Intake Questionnaire* on page 18 for the steps that Administrators in Prevail should follow to create a questionnaire template) as you take a call from a prospective new client. When you complete the questionnaire, Prevail will automatically create either a prospect or a matter (depending on how your Administrator sets up the Intake Questionnaire script), and certain parties (e.g., referral source, medical providers) may already be attached to the prospect/matter, saving you the time of attaching these parties after the prospect/matter is created! Also, fields on the Matter tab (e.g., education or military information) may already be populated for you, depending on the script. Prevail saves the full text of the completed Intake Questionnaire on the History tab for the new prospect/matter.

Generating an Intake Questionnaire for a New Prospect *(continued)*



Follow these steps to generate an Intake Questionnaire when you receive a call from a prospective client.

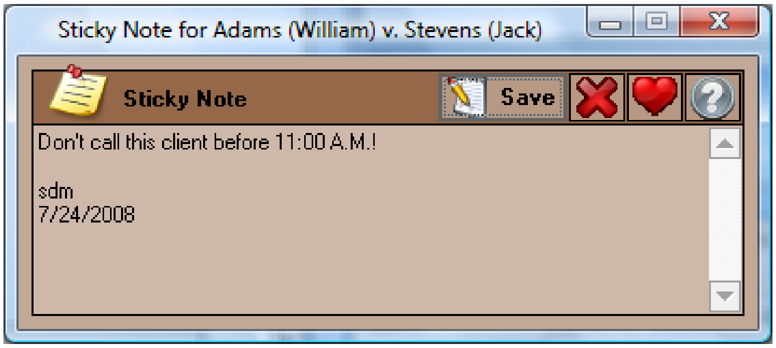
Step	Task
1	Click on the 'Questionnaires' button in the Prevail toolbar.
2	• Click on '+New' to start a new questionnaire for a prospective client, or • previous questionnaires that have not been completed will appear in the list of results in the lower half of the window. Double-click on any of these entries to open the saved questionnaire, and pick up where you left off.
3	Enter the information in the questionnaire as prompted.
4	Before Prevail automatically creates a prospect or matter, it will prompt you to either confirm which existing Rolodex entry to attach or create a new one (for the prospect and for any 'Contact' question types that you created). • Double-click on the contact's name in the Questionnaire window to open the Rolodex search window. • If a matching entry already exists in the Rolodex, double-click on it to attach it to the newly created prospect or matter. • If a matching entry does *not* already exist in the Rolodex, click on 'New', and Prevail will automatically create a new Rolodex entry.

Generating an Intake Questionnaire for a New Prospect *(continued)*

Step	Task
5	Click 'Finish'. The new prospect or matter appears.

Chapter Eight: Tools

Sticky Notes



Although there are a number of places in Prevail to track notes, there are occasions when a particular piece of information is so important in a particular matter that you don't want *anyone* in your firm to do anything in that case without knowing and acknowledging that piece of information. If a piece of information is that important, you certainly don't want it buried three pages deep in notes or over on the History tab, which the user may or may not be looking at when he or she pulls up the matter. This is the time to use a Sticky Note in the matter! When you pull up a matter that has a Sticky Note attached, the Sticky Note window will pop up in front of the page, and you won't be able to view what's underneath it without first clicking the 'Save' button.

<u>Attaching a Sticky Note to a Matter</u>

Follow these steps to attach a Sticky Note to a matter.

Step	Task
1	Open the matter to which you'd like to attach a Sticky Note. *Note: See *Matter Search* on page 41 for instructions on how to navigate to a specific matter.
2	Click on 'Tools' from the Prevail main menu, and then click on 'Sticky Note'.
3	Click 'Add Sticky Note'. A 'New Sticky Note for Matter' window appears.

Attaching a Sticky Note to a Matter *(continued)*

Step	Task
4	Enter the message for the Sticky Note in the window. *Note: It's a good idea to put your login name or initials and the current date on any Sticky Note you create. This way, other users will know how recent the information is and who put it there.
5	Click 'Save'.

Adding More Information to an Existing Sticky Note

Follow these steps to add information to an existing sticky note, rather than create a new one.

Step	Task
1	Open the matter to which you'd like to attach a Sticky Note. *Note: See *Matter Search* on page 41 for instructions on how to navigate to a specific matter.
2	Click on 'Tools' from the Prevail main menu, and then click on 'Sticky Note'.
3	Click 'Cancel', and the existing Sticky Note will appear.
4	Add the necessary information to the existing Sticky Note.
5	Click 'Save'.

Deleting vs. Closing a Sticky Note

After a user has created a Sticky Note for a matter, the Sticky Note will continue to appear until someone deletes it. If a user simply closes a Sticky Note, the Sticky Note will re-appear the next time a user navigates to that matter.

To *close* a Sticky Note, click on the red 'X' in the upper-right corner of the Sticky Note window. To *delete* a Sticky Note permanently, click on 'Delete' at the top of the Sticky Note window.

Extract Files

The "Extract Files" feature in Prevail 5 automatically creates a folder within your C:\PREVAIL_CLIENT folder that contains selected files that have been attached to a client's History tab entries (such as merged or scanned documents, or attached files). Prevail creates a folder (with the matter title as the name of the folder) for each matter in which you use the "Extract Files" feature. The attached files can be of any format (such as documents, pictures,

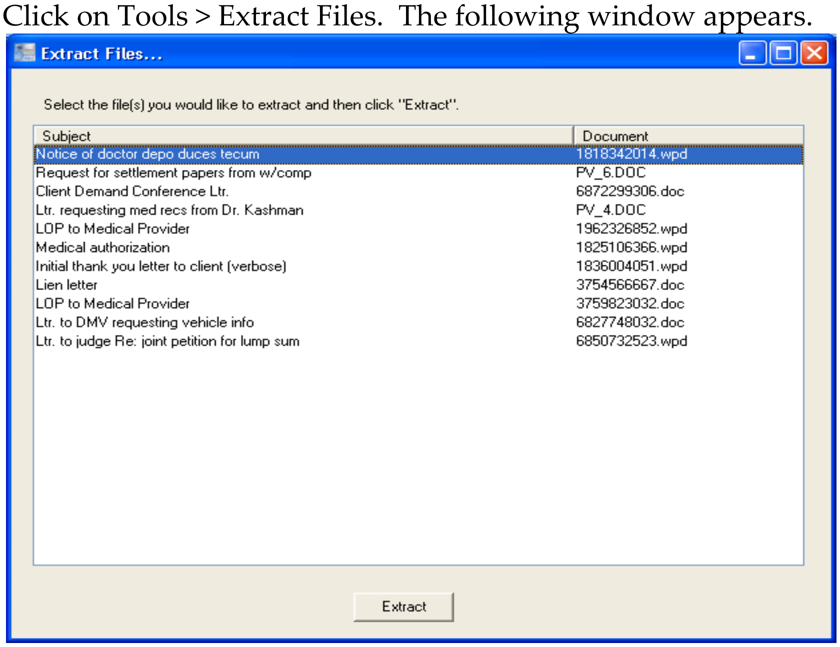
Extract Files *(continued)*

PDF files, HTML files, etc.). After extracting the file attachments into a separate folder, you will have easy access to these files and can "carry them with you" to work with, even when you don't have access to Prevail. Or, you may wish to save the extracted files to a CD to provide to your client upon completion of the case. "Extracting" a file simply creates a *copy* of the file, and it does not affect the copy saved on the History tab.

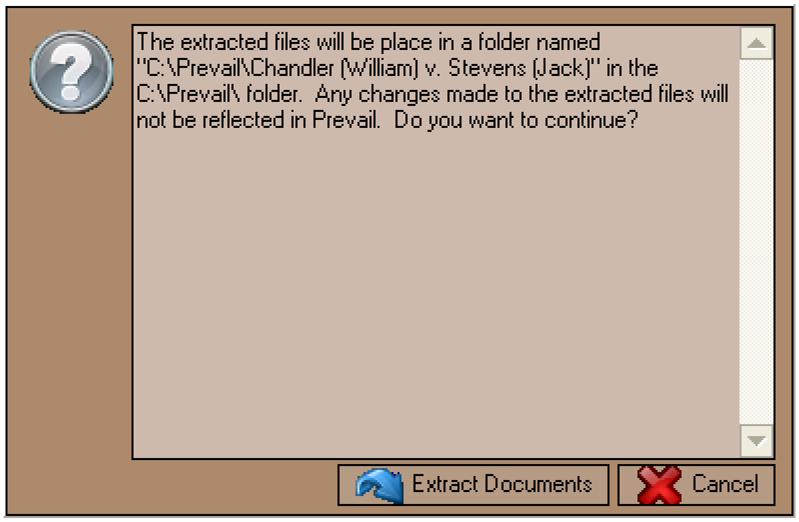
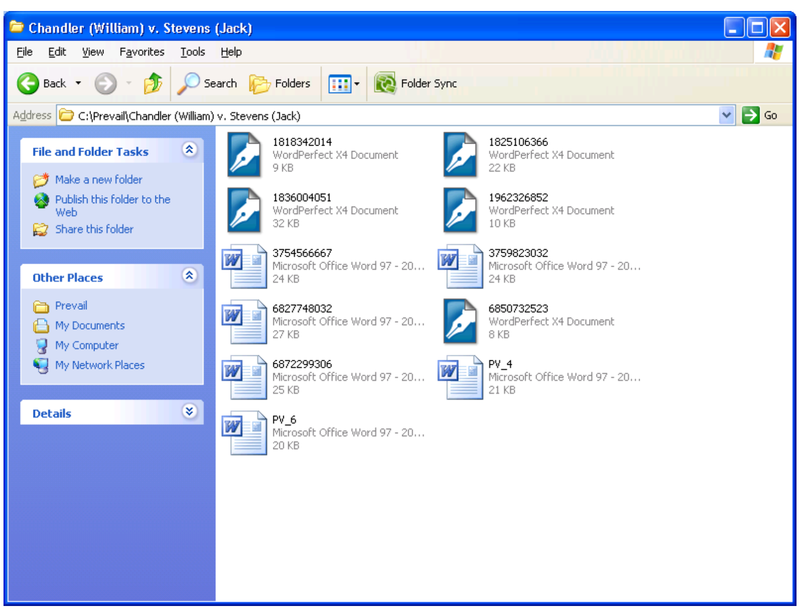
**Please note that any modifications you make to extracted documents will *not* copy into Prevail when you return to Prevail. If you make any changes to the files after you extract them, you will need to save the revised file under a different filename. Then, when you return to Prevail, either

- return to the original History entry from which the file was extracted, and replace the old file attachment with the modified file that you saved under the new filename or
- create a new History entry, and attach the new file

Follow these steps to extract files from the History tab.

Step	Task
1	Navigate to the History tab for the appropriate client.
2	Click on Tools > Extract Files. The following window appears. 

Extract Files *(continued)*

Step	Task
3	Select the file(s) that you wish to extract. *Note: To select only one file to extract, simply click on that file. To select multiple files, hold the <Ctrl> key down on your keyboard while clicking on the appropriate files. To select *all* files, hold the SHIFT key down on your keyboard, and click on the first and last files in the list. The following window appears. 
4	Click 'Extract Documents'. After the file extraction is complete, the following window appears, showing the documents that have been extracted. 

Extract Files *(continued)*

Step	Task
5	When the window appears displaying the extracted files, you may wish to copy the folder to a flash drive, CD, or any other form of media. After you have saved the folder to whatever media you choose, delete the client's folder of extracted documents from the C:\PREVAIL_CLIENT folder.

Chapter Nine: Reports

After you get your office up and running with Prevail, and you're inputting lots of valuable information into the program, you'll want to be able to analyze this data in a meaningful way. For example, you may want information readily available regarding monies due, lists of open matters, case status reports, etc. You'll use the Prevail Reporter to gather such information from your Prevail database. Numerous reports are built into the software, but if you need a report that doesn't already exist, customized reports are available by contacting Tech Support at reports@prevail.net.

Running Reports

Follow these steps to run a Prevail report.

Step	Task
1	Click on 'Reports' on the Prevail main menu, and go to the appropriate folder and report that you would like to generate.
2	Depending on which report you choose to generate, you may see a window prompting you to enter information (such as a name or case number) to limit the results that the report will display. • If you do *not* want to limit the results to a specific case number, date range, employee login, client name, etc., simply click on 'OK' in the window, without entering information in any of the fields. • If you want to limit the results that will display in the report, enter the appropriate case number, date range, employee login, client name, etc., in the fields provided, and then click 'OK'. **IMPORTANT NOTE: If you specify a name for which to run the report, you *must* capitalize the first letter of the name (just as the name appears in that person's Rolodex entry). If you specify a certain employee login, you *must* enter that employee login in ALL CAPS, just as it appears on the Prevail login screen.
4	You may choose to Save, E-mail, or Print a report after it is generated. • To save a report, click on 'Save' at the top of the report window. Then, browse to the appropriate location to save the file. • To e-mail a report to another user in your office, click on the 'E-mail' drop-down list at the top of the report window, and choose the appropriate user to receive the report. *Note: In order for a user's e-mail address to appear in the drop-down list, you *must* have an e-mail address entered for that user in their employee setup (located under the Administration > Employees menu in Prevail). • To print a report, click on 'Print' at the top of the report window.

Chapter Ten: Prevail Control Panel

You'll want to always ensure that your Prevail 5 is running the latest update to the program. Otherwise, you may miss out on new features that are constantly being added. This is where the Prevail Control Panel comes into play! You'll also use the Control Panel to maintain your database files.

The first time that you use the Prevail Control Panel, you'll be prompted for a Security Key before being allowed access. This Security Key is printed on a sticker affixed to the back of your Prevail CD envelope. Be *very* careful when entering your Security Key, as it is case-sensitive and must be input correctly in order to proceed. A typical Security Key consists of ten alphanumeric characters.

<u>*Note: Some features in the Prevail Control Panel (such as downloading updates) require that all Prevail users in your firm be logged out of Prevail.</u>

Updating Your Version of Prevail

When a Prevail update is available, you'll see a message on the Prevail login screen stating, "A Prevail 5 update is available." If you see this message, make sure all users (including yourself!) are logged out of Prevail. Then, follow these steps to download the update.

Follow these steps to download Prevail updates.

*Note: You may download Prevail updates from *any* workstation; you do *not* have to run the update from your Prevail server. The update will apply to all workstations, regardless of which PC you use to download the update.

Step	Task
1	On your Windows desktop, click on Start > All Programs > Prevail > Control Panel.
2	When the Prevail Control Panel login screen appears, use your regular Prevail login and password.
3	A message will confirm that all users are logged out of Prevail, or will indicate which users are still logged in (and need to log out before moving forward with the update).
4	Click *once* on 'Update' at the top of the Control Panel window. The download will start automatically.

Updating Your Version of Prevail *(continued)*

Step	Task
5	When the download is complete, you will see a message at the bottom of the Control Panel window indicating that your Prevail database is locked. At this point, click on 'Unlock Database' at the top of the Control Panel window.
6	Close the Prevail Control Panel window. All users may now log into Prevail.

Repairing Field Name Errors

When you run the operation to repair field name errors, Prevail rebuilds the full name Rolodex fields. This process should repair any full name field that may be incorrect.

Follow these steps to repair field name errors.

*Note: Users may continue to work in Prevail while this utility is running.

Step	Task
1	On your Windows desktop, click on Start > All Programs > Prevail > Control Panel.
2	When the Prevail Control Panel login screen appears, use your regular Prevail login and password.
3	At the top of the Prevail Control Panel window, click on Tools > Rebuild Full Names.
4	When the rebuilding is complete, close the Prevail Control Panel window.

Deleting Unused Rolodex Entries

In order to delete a Rolodex entry in Prevail, you must detach that entry from any of your matters to which it is attached. (See *Deleting Rolodex Entries* on page 44 for more details.) Then, you may delete those Rolodex entries one at a time.

Alternatively, if you would like to delete multiple Rolodex entries at once, you may use the "Delete Unused Rolodex Entries" utility in the Prevail Control Panel (after you have detached these entries from all matters in Prevail).

Deleting Unused Rolodex Entries *(continued)*

Follow these steps to delete unused Rolodex entries.

*Note: Users may continue working in Prevail while this utility is running.

Step	Task
1	On your Windows desktop, click on Start > All Programs > Prevail > Control Panel.
2	When the Prevail Control Panel login screen appears, use your regular Prevail login and password.
3	Click on 'Tools' at the top of the window, and then click on 'Delete Unused Rolodex Entries'. A 'Delete Rolodex Wizard' window appears.
4	Click on each unused Rolodex entry that you want to delete. *Note: You may select multiple unused Rolodex entries simultaneously by holding down the <Ctrl> key on your keyboard while clicking on individual entries.
5	After you have selected all unused Rolodex entries that you want to delete, click 'Delete' at the bottom of the window. *Note: If you decide not to delete any unused Rolodex entries, click 'Cancel' at the bottom of the window.
6	Close the Prevail Control Panel window.

Reassigning Employees

Certain situations, such as hiring a new employee, may require you to change the attorney or case manager currently assigned to a matter. For example, if you reassign all of "Tom's" matters to "Mary," Prevail will automatically change the lead attorney or case manager field for all matters previously assigned to "Tom" to "Mary." Prevail will also transfer all of "Tom's" appointments and tasks to "Mary."

Reassigning Employees *(continued)*

Follow these steps to reassign matters (where the user is assigned as Lead Attorney or Case Manager), appointments, and tasks from one user to another.

*Note: All users must be logged out of Prevail in order to run this utility.

Step	Task
1	On your Windows desktop, click on Start > All Programs > Prevail > Control Panel.
2	When the Prevail Control Panel login screen appears, use your regular Prevail login and password.
3	A message will confirm that all users are logged out of Prevail, or will indicate which users are still logged in (and need to log out before moving forward with this procedure).
4	Click on 'Tools' at the top of the window, and then click on 'Reassign Employees'.
4	Choose the *former* attorney or case manager's name from the 'From User' drop-down list.
5	Choose the *new* attorney or case manager's name from the 'To User' drop-down list.
6	Click 'Finish' at the bottom of the window.

Pack & Reindex

All databases keep records in order (e.g., alphabetical or numerical) by creating index files that indicate the next sequential record for a given arrangement scheme. This eliminates the need for the database engine to physically rearrange large numbers of records. Instead, the database keeps a "roadmap" of which records go in which order. Prevail contains dozens of these *index files*.

If a workstation is turned off or rebooted during a disk write operation, a power fluctuation causes a brownout, or a hardware failure of any sort causes a network error during a disk write operation, one or more of these indexes may become corrupted. If a corruption occurs, you'll typically receive an error message when trying to write or save information into one of the Prevail screens. The Reindex operation on the Prevail Control Panel generally fixes this sort of problem, in most cases eliminating the need to even call Tech Support.

Pack & Reindex *(continued)*

Follow these steps to reindex your files.

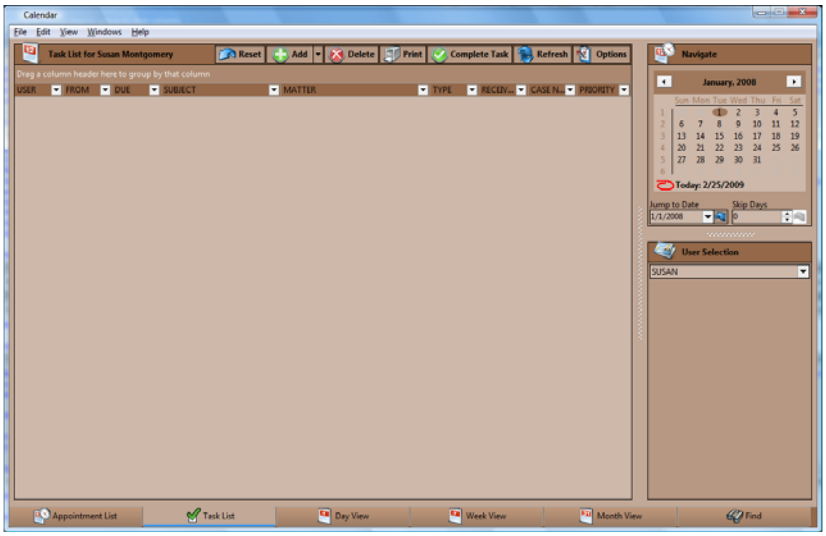
*Note: The Pack & Reindex utility may take a while (in some cases as long as 20 minutes for a large database), and all users *must* be logged out of Prevail while this utility is running.

Step	Task
1	On your Windows desktop, click on Start > All Programs > Prevail > Control Panel.
2	When the Prevail Control Panel login screen appears, use your regular Prevail login and password.
3	A message will confirm that all users are logged out of Prevail, or will indicate which users are still logged in (and need to log out before moving forward with this procedure).
4	Click on 'Pack & Reindex' at the top of the window.
5	When the 'Pack & Reindex' utility completes, close the Prevail Control Panel window.

Chapter Eleven: Extras

As you'll soon discover, there are numerous extra features that you'll enjoy as work more in Prevail. This chapter provides an overview of those features.

Grid Layout



Throughout Prevail, many screens have a "grid" layout (i.e., the screen layout appears as a table, with columns and rows of information). This layout is a useful feature, as it allows you to *filter*, *sort*, and/or *group* the entries on the page. For example, if you are working through your task list and want to filter your view to display only "High Priority" tasks, you can do so by applying a filter. Or, if you're working on the History tab and want to quickly find a particular document entry, you can use a filter to make your search much faster!

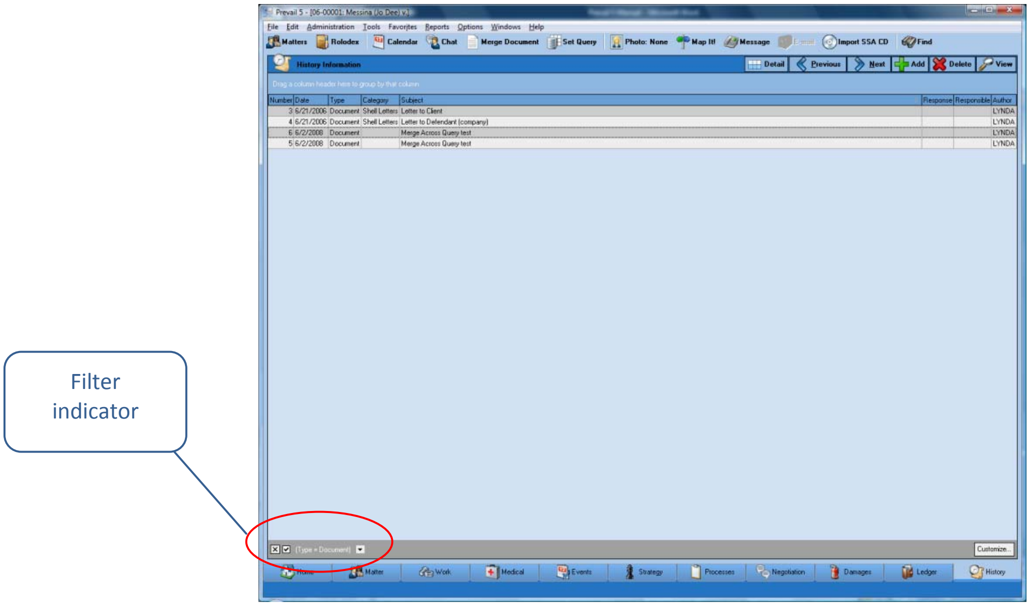
The grid layout exists in the following key areas of Prevail:

- History
- Calendar (Task List and Appointment List views)
- Home tab – My Statute List, Messages, Upcoming Appointments, Upcoming Tasks
- Events
- Ledger
- Negotiation (where applicable)
- Damages (where applicable)
- Medical
- Disabilities (where applicable)
- Employment (where applicable)

*Note: You may apply multiple grid settings at the same time. For example, you may choose to first filter on a particular column and then sort in date order.

Grid Layout *(continued)*

Filtering Grid Entries



When you are in any area of Prevail that contains a grid layout, you will see a drop-down arrow for each column header when you hover over it. To apply a filter, simply click on the drop-down arrow for the column you wish to filter by, and choose the appropriate selection. The filtered view will display.

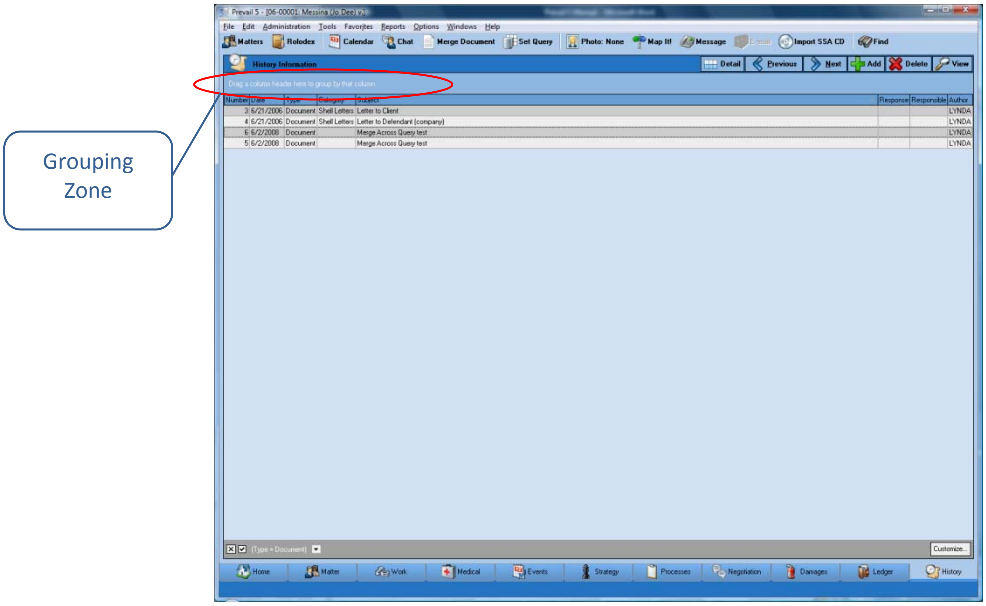
To clear a filter and return to the full display, click on the 'X' in the lower left of the window, or click on the drop-down arrow for the column header again, and choose "All".

Sorting Grid Entries

You may also sort entries within a grid layout. To apply a sort based on a particular column (e.g., date) click on the column header label (the word itself, *not* the drop-down arrow). Each time that you click on the column header label, the entries will reverse their sort order, based on that column.

Grid Layout *(continued)*

Grouping Grid Entries



You may group entries within a grid layout, as well. For example, you may group the entries on the History tab according to their type, rather than having all of the entries displayed in order of their entry.

To apply a grouping within a grid, click on the appropriate column header, and hold your left mouse button down while dragging the column header up to the shaded area just above the grid. (Green arrows will appear to help guide you.) Release your left mouse button, and the entries in the grid will then be classified in groups. Click on the '+' sign next to any of the group names to expand the group and show all entries in that particular category.

To remove a group setting, and return to the normal view, drag the column header back to its original position.

Grid Layout *(continued)*

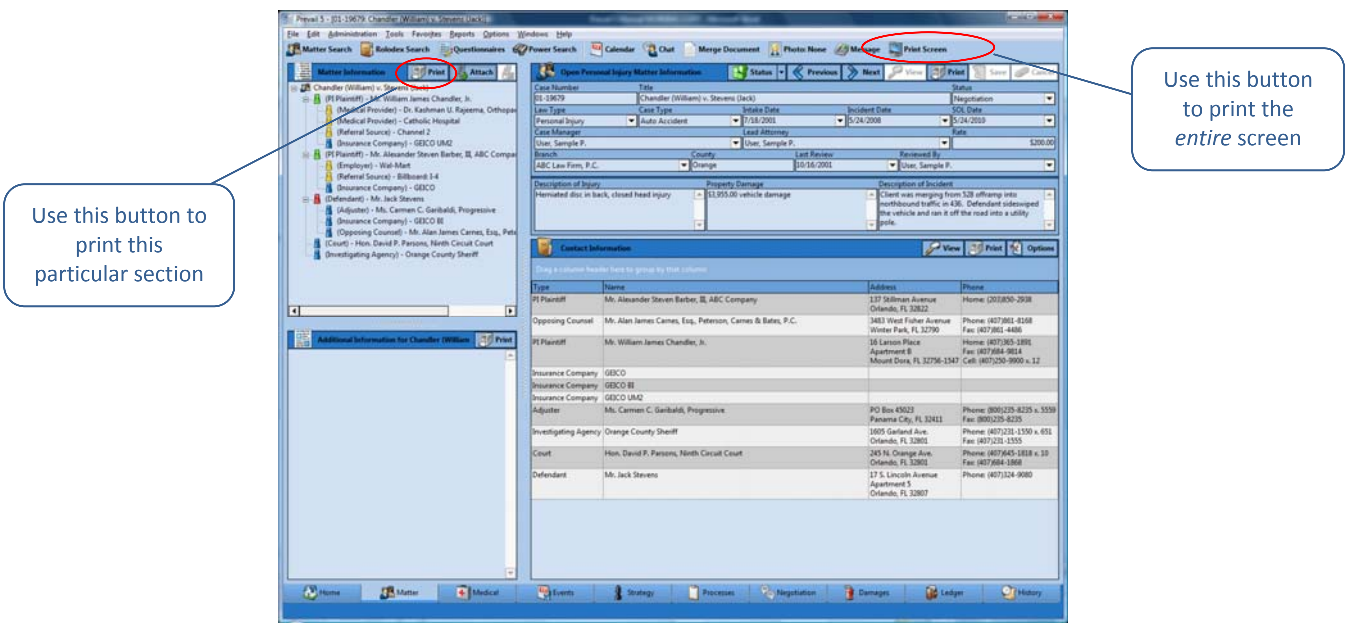
Saved Filters in History and Ledger

If you have a particular grid setting that you use often on the History or Ledger tabs, you may choose to save that particular view. That way, you don't have to repeatedly apply the same settings each time that you visit

Follow the procedures above for filtering, sorting, and grouping grid entries to configure the display as desired. Then, click the 'Filter' button in the upper right area of the grid. Click 'Create Filter from Current View'. Enter a name in the "Filter Name" field, and click 'Save'. The next time you need to quickly apply the current display settings, click the 'Filter' button, and then click on the name of the appropriate filter.

To return to the regular grid view, click on 'Filter', and choose to remove the filter.

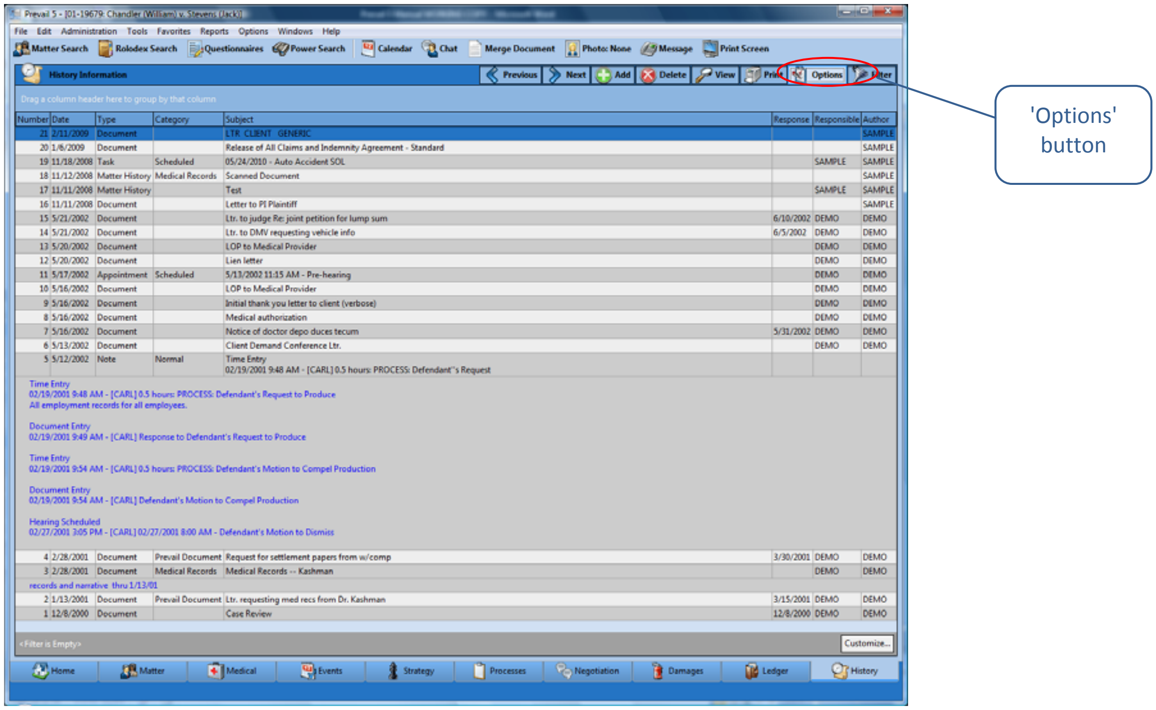
Printing Tabs



Prevail allows you to print entire tabs or particular sections of tabs. On each tab within the program, you'll see a 'Print Screen' button in the Prevail toolbar at the top of the screen. Click on this button to print a screenshot of your entire view.

Alternatively, you may print individual sections of a tab. On each tab section, you'll notice a 'Print' button. Click on this button to print only that specific section of the tab.

Viewing Notes (Detail)



By default, tabs in Prevail do not display the notes (or detail) that you input within a particular entry. In order to see these notes, you must double-click on the entry to open it and see all notes.

However, you may choose to display the notes/detail as part of the regular grid view. In order to display notes in the grid, click on the 'Options' button in the upper right area of the grid, and make sure that "Notes" is checked.

Daily Backups of Your Prevail Data

It is *extremely* important that you backup your Prevail data daily! In order to do this, you'll need to save a copy of your PREVAIL_SERVER folder to an external device, such as a USB external hard drive. The size of your database will determine the capacity that you will need for your backup device.

To backup your data, browse to your 'X:\PREVAIL_SERVER' folder (where 'X' represents the drive on which your Prevail server is installed). Right-click on the folder, and click on "Send To". Choose the appropriate device for backing up your Prevail data.