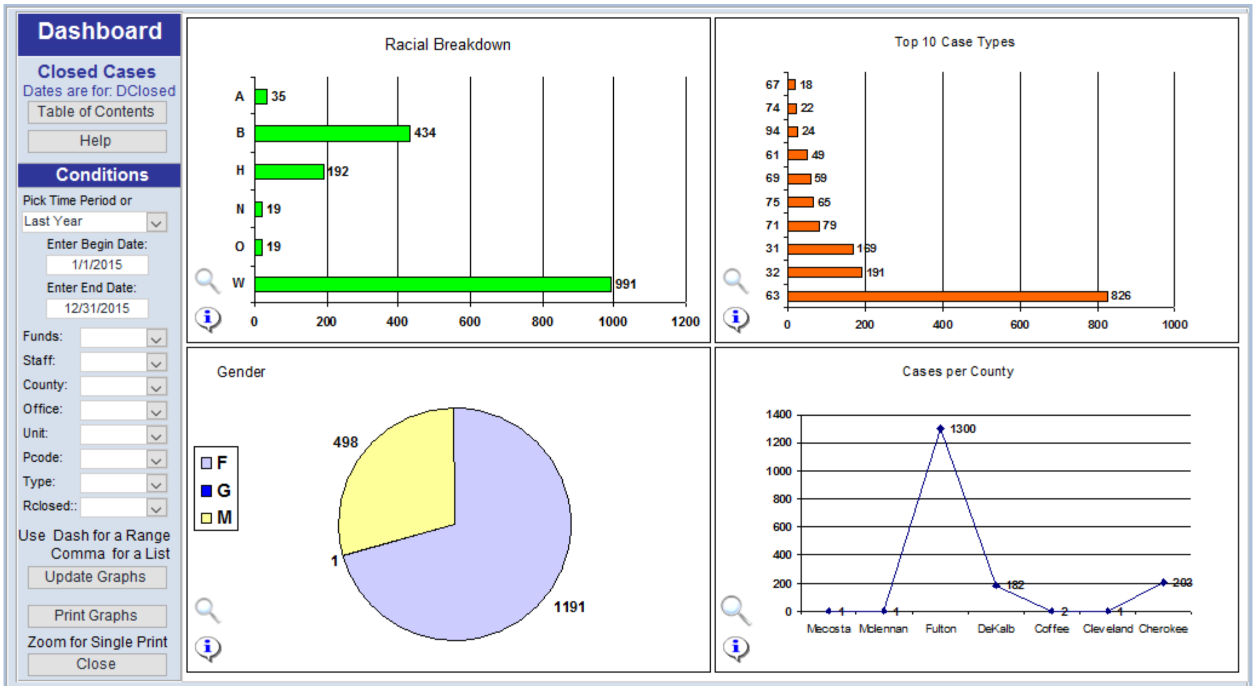
Twenty-five Good Reasons to Upgrade to Prime 16.3



Every few years Kemp's Case Works comes out with a major revision to Prime. Version 16 is such a major revision with a multitude of features people have been asking for. Prime 16 is a powerful, flexible and economical case management system. The following is a brief list of some of the new or improved features. These can help improve the quality and quantity of work you do for your clients.

The List

Reasons to Upgrade to Prime	
1	Business Intelligence Dashboard
2	Two way synch with Office 365 Calendar
3	Expanded Eligibility Options
4	Color cues on Search and Intake Screens
5	Improved Master Case Features
6	Better Simple Query Builder
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8	Speed Time and Notes
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24	Many substantive and appearance improvements.
25	Extensive documentation

1. Business Intelligence Dashboard

The *Business Intelligence Dashboard*, *Data Visualization* and *Dashboard Graphs* are all phrases for the same feature in Prime. This is the way that you can turn raw data into information needed by the Project Director, Litigation Coordinator, Unit Heads, Managing Attorneys, Development Director, Compliance Officer, Volunteer Attorney Coordinator Advocates, the Board and the Public.

It takes information that would normally be spread out over multiple reports and puts it into one place. Rather than exposing the user to streams of numbers, it gives them easy to understand graphs. These graphs show trends, check priorities and pinpoint problems. These graphs can compare multiple years. You can also choose to see the raw numbers the graphs are based on.

But running static, preprogrammed graphs would have limited use. Instead these graphs can be changed on the fly by the user. The following criteria can be changed to get the graph that is needed:

a) Dates
b) Offices
c) Units
d) Type of Case
e) Problem Codes
f) Staff Members
g) Funding Code
h) County

Instead of seeing just plain numbers, the user can see ranges, lists, calculated values, top 10 occurrences and compare multiple years on the same graph.

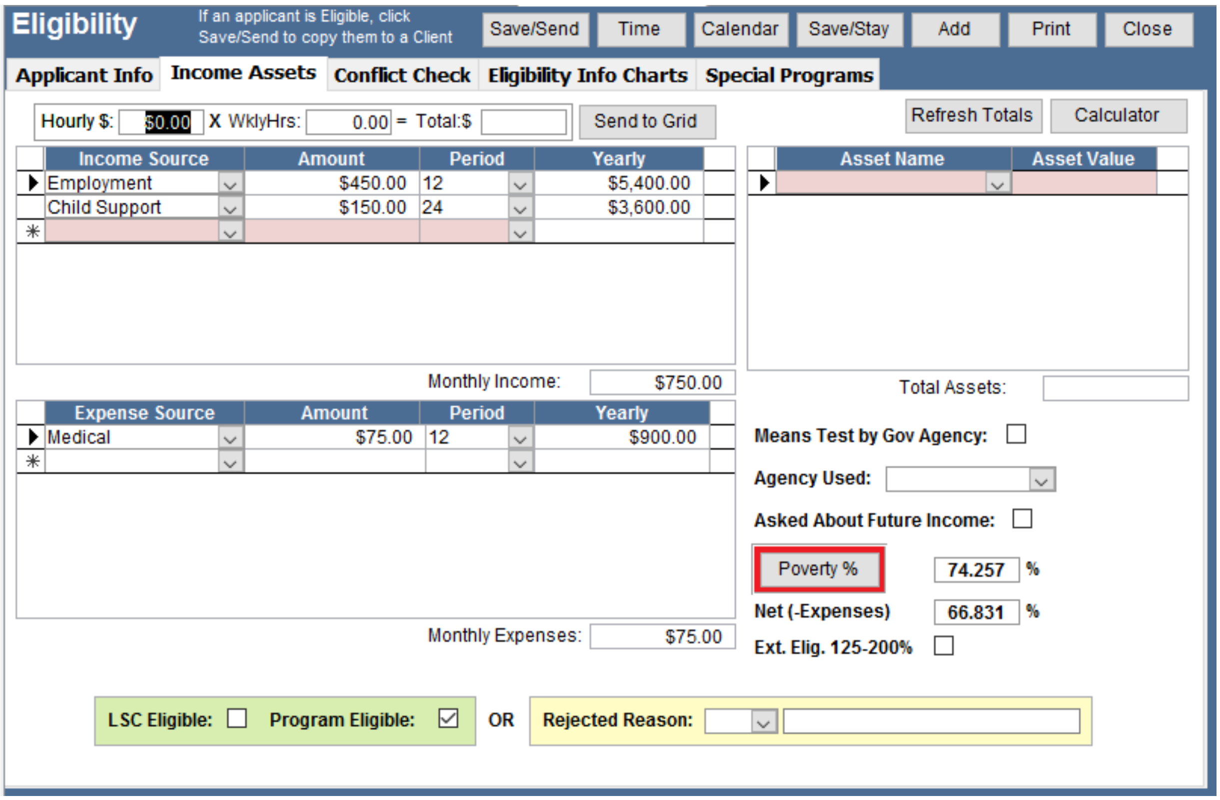
2. Two Way Synch with Office 365 Calendar

Prime's Calendar now has a two way synch with the Office 365 Calendar. This means events entered into Prime can appear on the Office 365 Calendar and those entered in Office 365 will show up in Prime.

3. Expanded Eligibility Options

Eligibility is extensively changed. These changes include:

a) An unlimited number of Adverse Parties can be entered and conflict checked
b) The spouse is included on the intake, like Clients.
c) An unlimited number of Income Sources along with their periods (such as monthly)
d) An unlimited number of Asset listings
e) An unlimited number of Expenses stored along with their periods
f) Adverse parties can have extended demographics entered for them such as address, Social Security Number, Adverse Attorney, Phone, etc.



4. Color cues on Search and Intake Screens

Conditional formatting now displays information on the search screens, reports and intake screens in an easy-to-understand manner using colors. For example, the Volunteer Lawyers Search Screen shows rows for the lawyers without an ongoing cases in Yellow. Those Lawyers no longer on panel appear, but their row is grayed out.

This feature is easily added to any search screen to bring select cases to the user's attention or point out errors. For example, the Client Search Screen could display the case number backgrounds of seniors in yellow and those of Veterans in blue.

Intake sheets are modified so that required fields show up in red until they get a valid value. Then they return to their normal color. This helps insure good data.

VATNUM	VFNAME	VLNAME	VCITY	VCOUNTY	VFIRM	VONI	VONC	VLASTC	V/	VPHONE
250	Jerry	Singer	Atlanta	Fulton		Yes	No	7/29/2017	404	327-5988
251	James	Skow	Atlanta	Fulton		Yes	Yes	5/4/2017	404	328-3938
252	Patsy K.	Schiff	Atlanta	Fulton		Yes	No		404	322-5518
2524	Mitch	Neuhauser	Atlanta	DeKalb	King & Spalding	No	No		404	572-3519
253	James	Schenk	Atlanta	Fulton		Yes	No		404	323-8108
254	James	Smith	Atlanta	Fulton		Yes	Yes	6/16/2017	404	326-1728
255	Charles	Landau	Atlanta	DeKalb		Yes	No	10/1/2017	404	323-2668
256	Peter	Smurr	Atlanta	Fulton		Yes	Yes	8/3/2016	404	323-8428
257	Howard	Stagg	Atlanta	Fulton		Yes	No		404	324-8408
258	Philip	Stanger	Atlanta	Fulton		Yes	No		404	325-3258
259	Ron	St. Clair	Atlanta	Fulton		Yes	Yes	10/4/2017	404	321-0968
26	Claire M.	Buckey	Atlanta	Fulton		Yes	Yes	9/10/2015	404	324-0208
260	Mary	Stroube	Atlanta	Fulton		Yes	Yes	2/25/2016	404	322-2318
261	T. R.	Sugano	Atlanta	Fulton		Yes	Yes	5/9/2016	404	320-2298
262	Daniel J.	Sullivan	Atlanta	Fulton		Yes	Yes	4/5/2017	404	324-9928
263	Rochelle	Schermer	Atlanta	Fulton		Yes	Yes	016 10:26:5	404	323-1578
264	James	Sherriff	Atlanta	Fulton		Yes	Yes	10/29/2017	404	322-4908

5. Improved Master Case Features

The Master Case Feature is better in several ways. A button turns the existing case into a Master Case. Reports on the intake sheet now show:

a) Members of the Master Case

b) Case Notes for multiple cases sorted by date

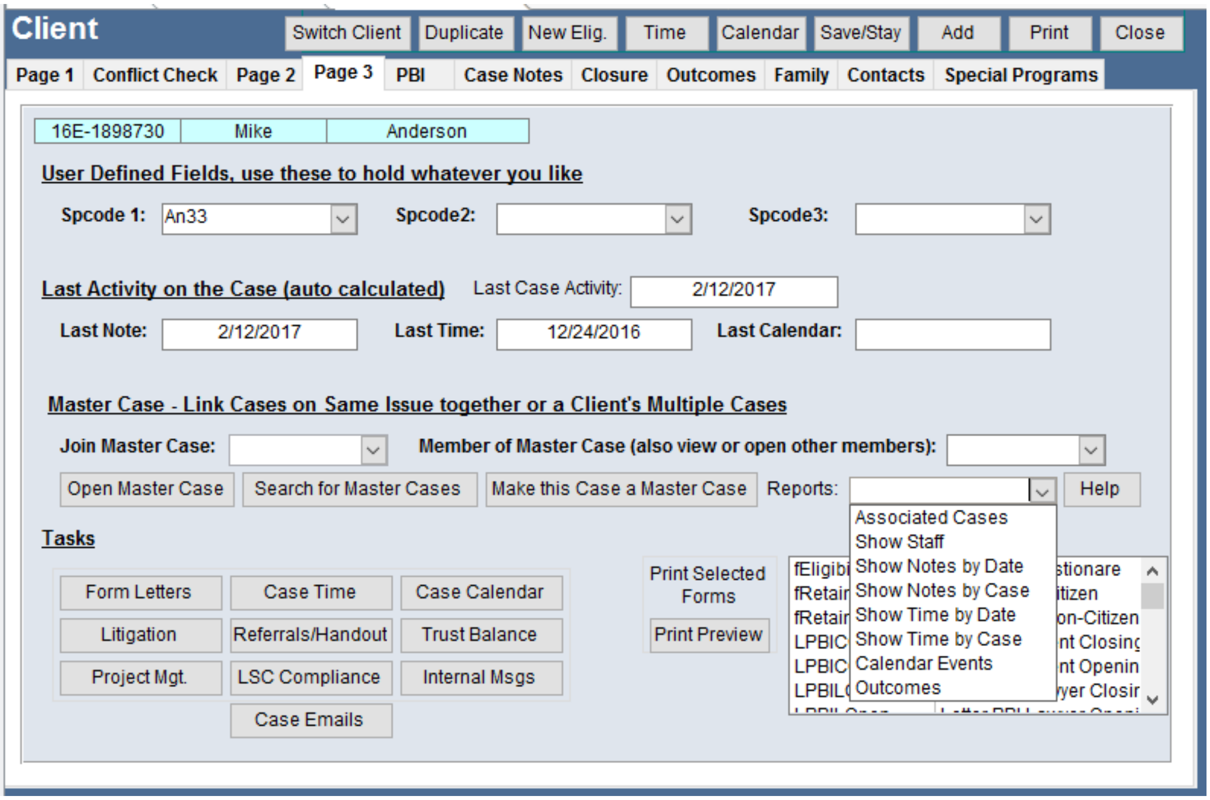
c) Case Notes for multiple cases sorted by case and then by date

d) Time for multiple cases sorted by date

e) Time for multiple cases sorted by case and then by date

f) Calendar events sorted by Date

g) Outcomes for all the cases

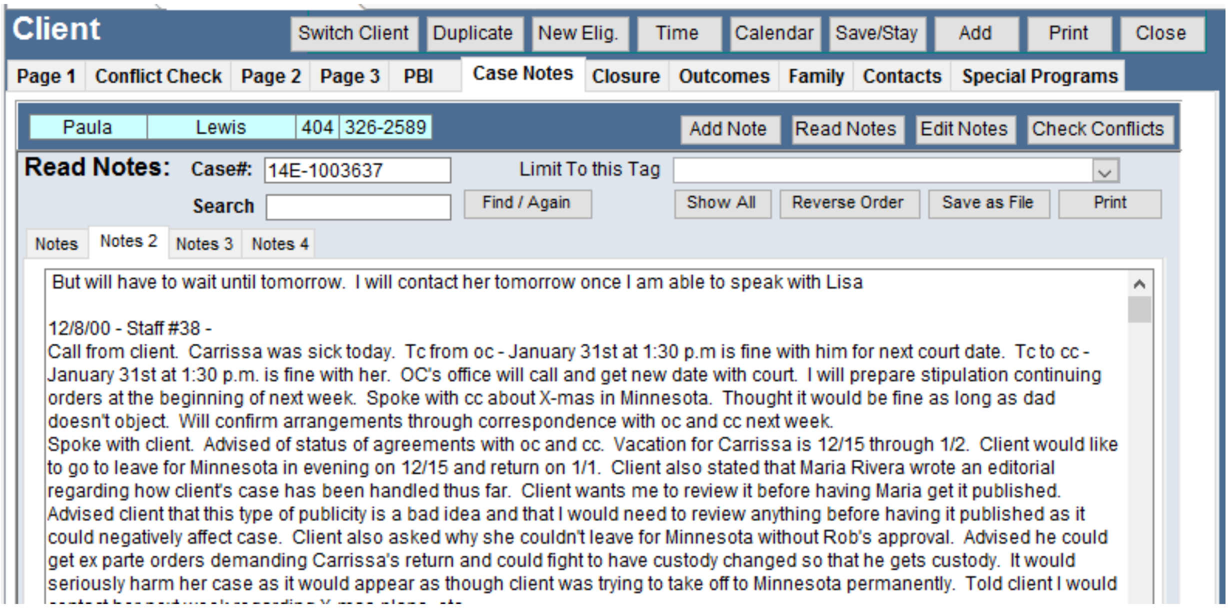


6. A Better Simple Query Builder

The Simple Query Builder has been improved several ways. It now allows you to build queries based on two table combinations, such as information from Clients and Time, Clients and Eligibility, etc. The number of criteria that can be entered has been increased. The number of levels of sorting has been increased. The resulting reports can be saved and played back at any time.

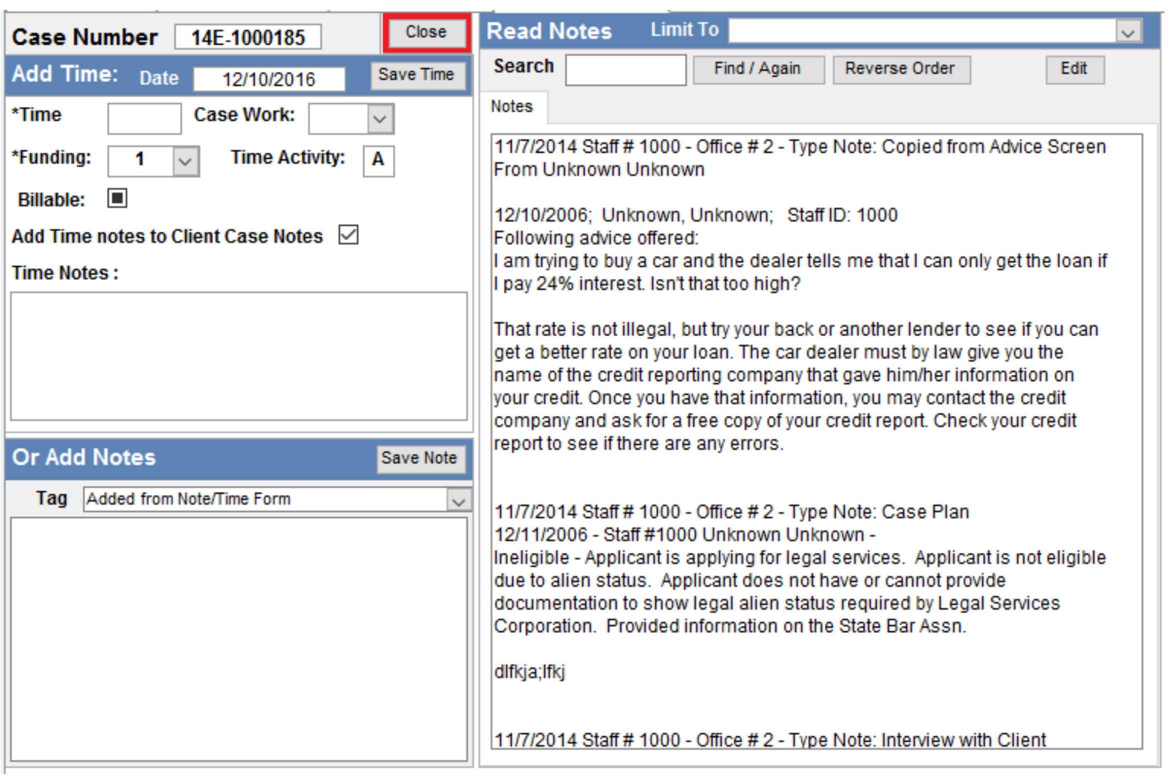
7. Auto Tabs for Long Case Notes

In the past, very long case notes would cause a shift into the edit mode, making them more difficult to read. Now the long notes appear on tabs. The number of tabs is dependent on the length of the note. They can still be searched, filtered by type and sorted (oldest to newest or vice versa). The number of tabs can be increased if the office has cases with particularly long notes. These tabs show up on Case Notes, Notes on Speed Notes and Notes on Search Screens.



8. Speed Time and Notes

High volume practices don't have time to waste. Speed Time and Notes allow you to quickly get to a case and add notes and time with the minimal number of key strokes. This feature is accessed off of either the Today Screen or the Home Screen. Select the case you want to work on from the Open Case List and click on the Speed Time/Notes button. You then have a choice to put Time in on the case (and have the note also go directly into case notes), or only enter a case note. You also can read all your previous notes.



9. Easier to Use Funding Code Analyzer

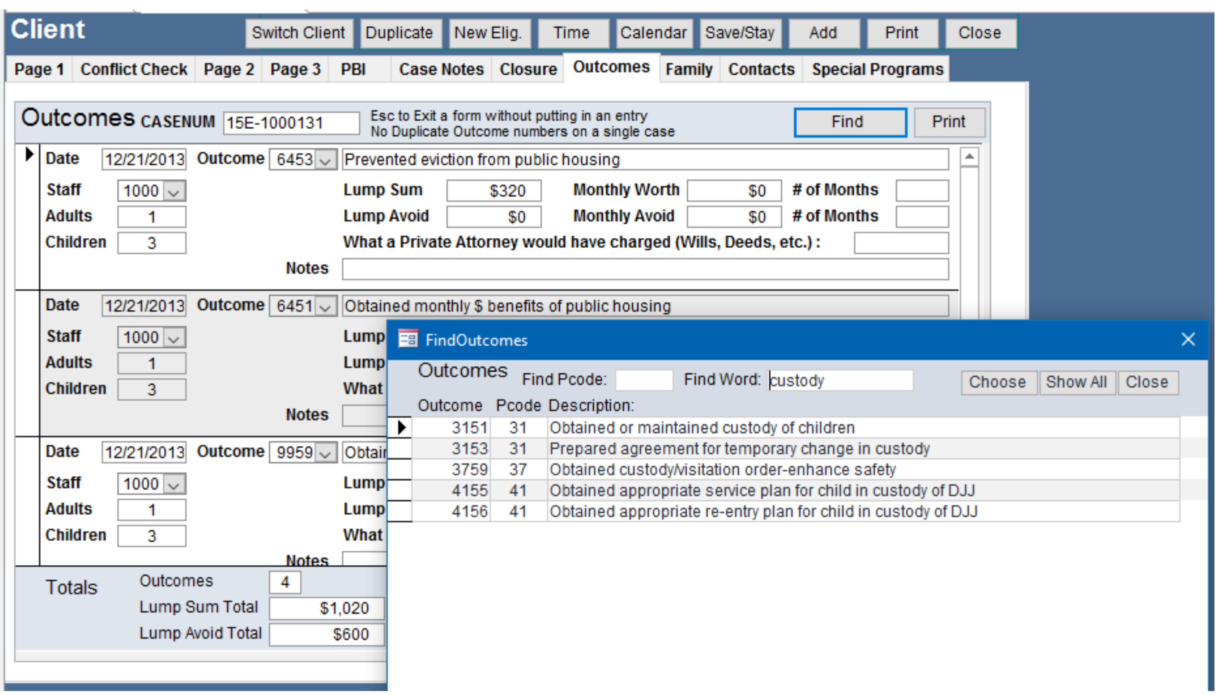
The Funding Code Analyzer is for offices with multiple funding sources and a need to track which cases are handed by each source. It builds a test using up to 57 different criteria about the client, case and location of the problem. This test is then applied to a case to insure that the correct funding code is applied.

This Analyzer is in its third generation and is easier to use and setup. It suggests to the intake person what code to use and provides the administrator with reports on whether the correct funding codes are on cases.

10. Outcomes Tab with Find Outcomes

LSC and IOLTA mandated Outcome (benefit) tracking is more easily done from the Client intake. Not only is there a separate Closing Tab but there is an Outcomes Tab that permits tracking multiple outcomes on a single case. Because the list of outcomes can be quite long, a Find button lets you search for the outcome you want by key word, such as ‘custody’ or by problem code, such as 63 (Landlord Tenant). Once you find the code you need, you can easily select it.

The Outcome Tab tracks the code, the lump sum recovery, the monthly recovery (and projected months), the lump avoidance, and the monthly avoidance (and projected months). It also allows you to keep track of the value of services rendered for cases that don’t have dollar result, such as deeds, wills, uncontested divorces, etc. A running tally for the case appears at the bottom of the form. An extensive number of reports exist for Outcomes.

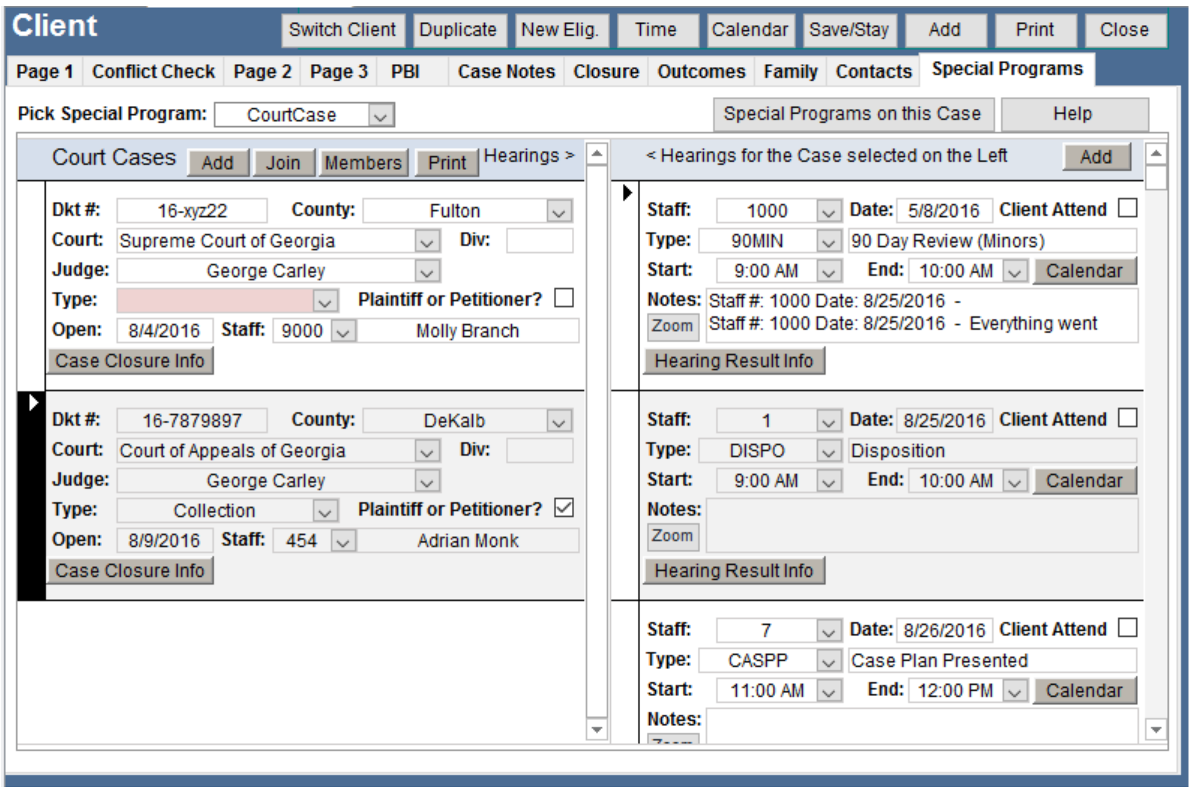


11. Shared Court Cases and Hearings

A new Special Program tracks both Court Cases and Hearings. However, the way it works is unique. Not only can you put in the Court Case (or related Hearing) for one client, but you can join any number of clients to the Case. This means if you are representing a group of siblings, tenants in an apartment, etc. you can relate all them to the same case at the push of a button.

You can enter any number of Hearings on a Court Case. A push of a button adds the Hearing date to your calendar.

Multiple clients in a case or hearing, means multiple results. The system allows you to put in separate results for each client on the Court Case and on each Hearing.



12. Volunteer Lawyer Improvements

There are many improvements to the Volunteer Lawyer information. Automatically calculated fields display the:

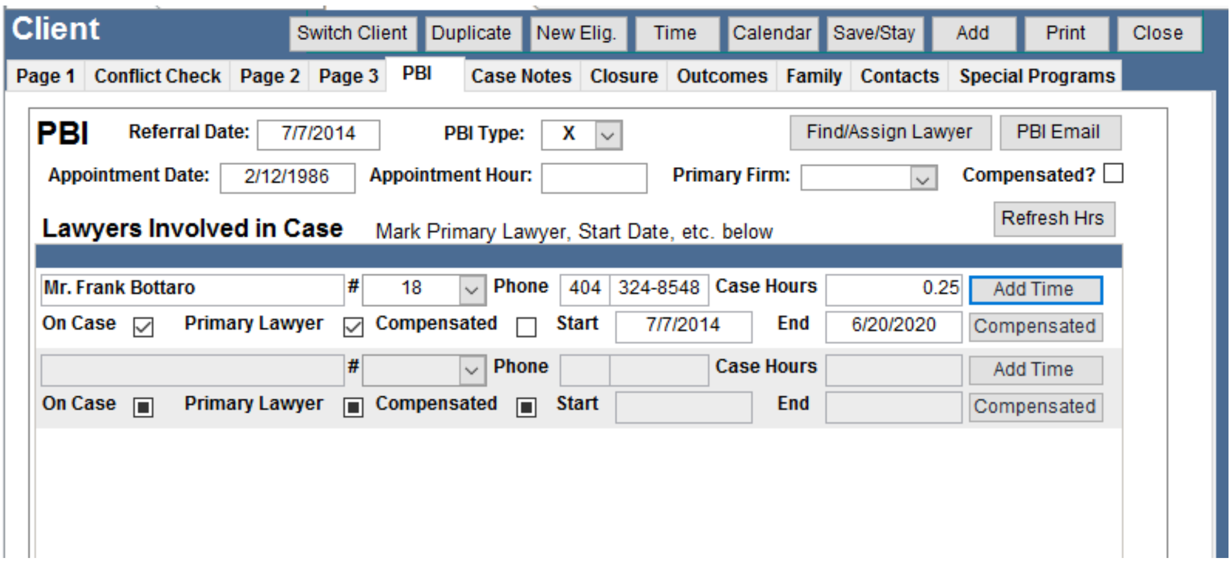
a) Date of the most recent activity
b) Number of cases taken
c) Number of cases taken in the last year
d) The total time spent
e) Date of the Last Case
f) Whether they have an ongoing case.

This information is always up to date when the user looks at the Lawyer Intake, the Lawyer Search Screen or generates a report.

13. PBI Case Improvement

The PBI (Private Bar Involvement) Case features are improved. PBI information is now on a separate tab on the Client Intake. You can assign an unlimited number of Volunteer Lawyers to a case. PBI Time keeping allows an unlimited number of slips on a case (none or a thousand). The PBI slip tracks a lawyer's:

a) Start date
b) End date
c) If they are the primary attorney
d) If they are currently on the case
e) The total time spent on the case
f) Whether the case is compensated
g) Their phone number



14. Calculated Fields show current information

Besides the calculated fields on the Lawyers intake, there are multiple calculated fields throughout the system. These values remain up to date requiring no action on the part of the user.

a) Clients
   1) Total Hours on Case
   2) Current Age as of Today
   3) Date of Most Recent Action on Case
   4) Date of the latest Case Note
   5) Date of the latest Calendar slip
   6) Date of the latest Time Record
   7) Unique Client identifier

b) Law Firms
    1) Number of Cases Taken by Lawyers in the Firm
    2) Number of Cases Taken by Lawyers in the Firm in the last 12 months
c) Eligibility
    1) Total Income
    2) Total Assets
    3) Total Expenses
d) Callback
    1) The number of calls to and from the applicant

15. Web based Options Expanded

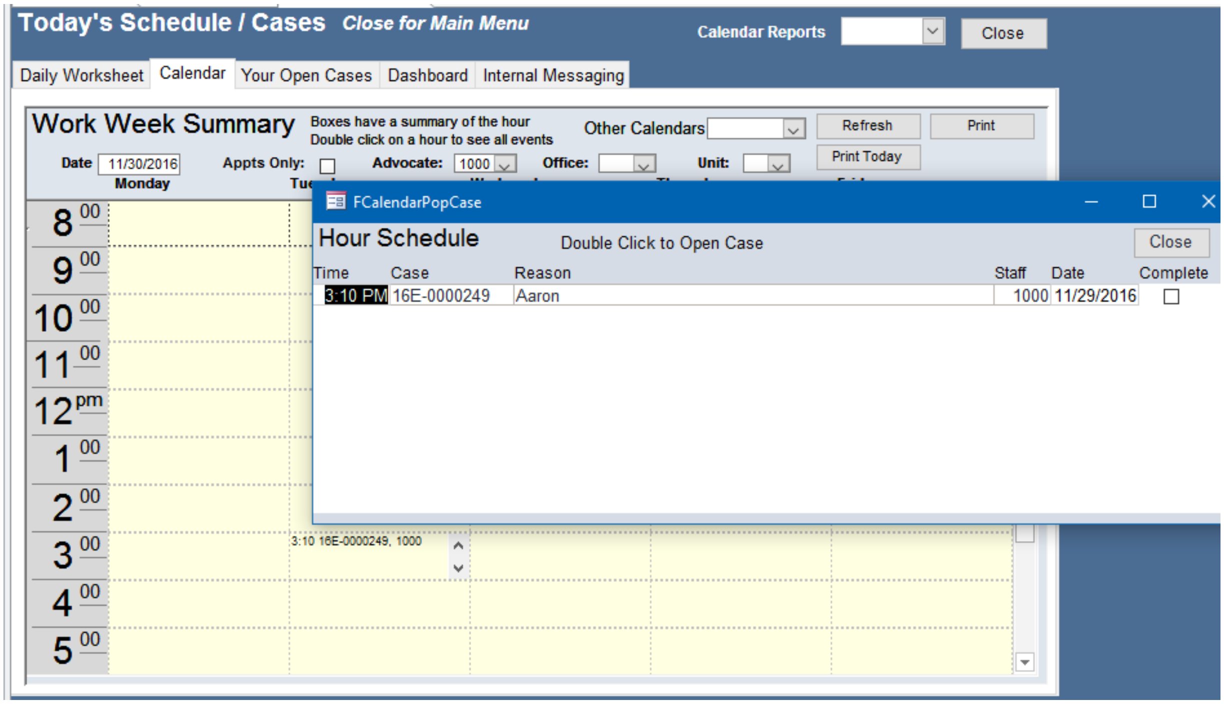
There are so many new and improved web options that a mere listing will have to suffice. More information is available on our web site at www.kempscaseworks.com. Prime now has these optional web based applilcations:

a) An Online Application system – The applicant's data goes directly into a table in Prime. There it is screened and either copied to Eligibility or rejected.
b) An A2J adapter allows the Online Application to use the A2J interview, but have the resulting data transfer directly into Prime when finished.
c) A Client Status website where clients can check on the status of their case by looking at documents designated by the advocate, without direct contact with a receptionist or advocate.
d) A Client Satisfaction survey that the client fills out over the Internet. The results return to the office via the Internet.
e) Clients can be texted directly from Prime to remind them of appointments, etc.
f) Automated Emailed Report Services generate reports on a scheduled basis and email these reports to designated staff members.
g) Blast Emails can be sent to your Volunteer Panel, letting them know about cases available for referral. It also can send special emails for cases that are an emergency.
h) Volunteer Attorney Web Portal allows attorneys to sign up to participate, select cases and manage them online. This includes adding notes and uploading and downloading documents. They can also close the case online.

The features in some of these applications might be affected by whether Prime is hosted by us or is hosted in the user's own office.

16. Improved Today/Home Calendar

The new Calendars that appear on the Today and Home screens have the option of showing a schedule for the Work Week, Week, Day or Month. Double clicking on a day explains what is scheduled and double clicking on an event takes you to the Intake sheet it was based on. It is easy to generate calendars for your work day, week or month from several places. You can adjust the Calendar to show the schedule for an Office, Unit, etc.



17. New simpler Quick Start Menu

The Quick Start Menu has been simplified. This means that users that have limited needs can use this as their Main Menu without the seeing options they don't use. It is very easy to tune this form to add additional features or remove ones that aren't used. This can be of great use to volunteers and law students where there isn't time to train them about all the features.

18. Shared Meetings

Cases involving multiple clients often have meetings with the opposing parties or amongst the clients. The Shared Meeting feature allows you to schedule a meeting and have other clients join in that meeting. A push of a button puts that Meeting on your Calendar.

19. The Meanings of Codes displayed on Intake

The intake screens now display the meanings of codes along with the codes. For example, instead of just saying *Unit 1* on the intake, it now says *Unit 1 Hotline*.

20. Error Alert Changes, New and Discarded

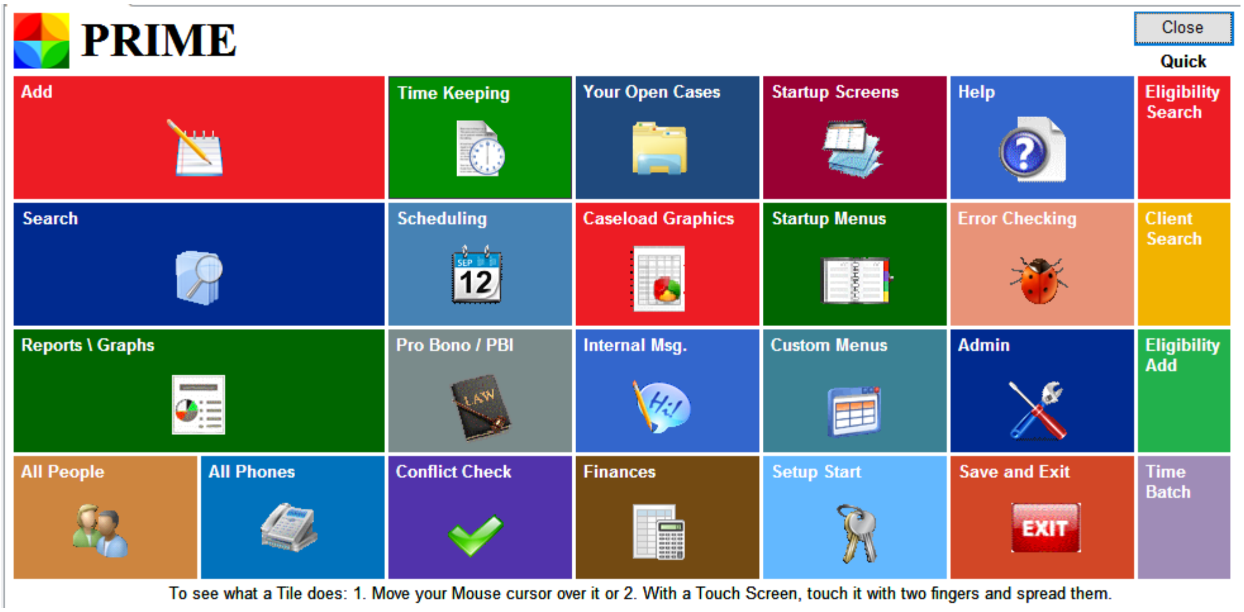
The Error Alert that runs at startup has been improved several ways. The first is by eliminating checks that are unnecessary because of validation rules. Several new checks have been added.

21. Super Duplication Improved

Users who decide to duplicate a case can now see which fields will be duplicated. A box on the left of the screen lists the fields always duplicated and a box on the right lists those fields that the user has selected to be duplicated.

22. Quick Column on Touch Tiles

Want to save your staff time by putting their most used features at their fingertips? The Quick Column on the Touch Tile screen can be modified or expanded to make getting to the most important screens a single click away.



23. Rewritten Project Management

Project Management is a feature that allows an office to capture knowledge about complex activities that need to be repeated in the future. It allows them to store tasks, problems, scheduling, staffing and budgeting. It can be used for complex cases or activities that don't relate to cases. This captured knowledge can then be imported into a new similar activity. Use of this has been made simpler and clearer.

24. Many substantive and appearance improvements

Additional tabs, consistent colors and an overall better spacing of intake sheets make them easier to use and read. For example, the closure information for Clients is now on one tab. The Eligibility sheet income, expenses and asset information is on one tab. There is a new Stale Case Search screen that finds cases without activity for a set period. New fields were added to Trust to help track Checks that cleared the bank and why they were written. Many other improvements exist.

25. Extensive Documentation

Prime 16.3 has a Reference manual of over 310 pages with over 400 screen shots, a Table of Contents and an Index. There is an 85 page Excel Spreadsheet that lists and describes the over 240 tables in Prime. The 105 primary tables have a listing and description of all their fields.

Contact Us

Get in touch with us today so you can start getting the benefits of Prime 16. You can contact us via phone or email.

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