Why You Should Upgrade to Prime 16

1. All of the sophisticated coding developed for the old version of Prime can be moved into the new version with little or no modification.
2. Converting the data can be done with the minimum amount of time and trouble.
3. Users are acquainted with the basics of Prime. They can spend time learning the more sophisticated features rather than relearning the basics.
4. The yearly cost of using Prime has been and is minimal.
5. Prime remains easy to customize to meet the current and future needs of the programs.
6. Multiple interfaces allow users to choose what suits them best.
7. The technology and software necessary to use Prime 16 is already in your office.
8. Your technical people managing Prime already understand how it works and how to support it.
9. The system can be hosted in your own office or by KCW in a high security data center managed by a multi-million dollar company (Venture Technologies).
10. Prime continues to evolve and get better.
11. Maintenance agreements are optional.
12. Upgrades are optional.
13. The system is totally open and we don't conceal things such as file structure and coding.
14. No restrictive agreements have to be signed.
15. Since it is based on standard Microsoft components, when these improve, Prime improves.
16. Perhaps the best reasons to upgrade to Prime 16 are all the improvements that have been added. What follows is a broad A to Z overview of these changes.

    a. Error Alert when starting system
        i. Check for errors 81 different ways
        ii. Add your own additional error checks
    b. Interface – Set by the user
        i. Ribbon bar is always present at the top of the screen
            1. Can show all the time or
            2. Can be minimized
        ii. Start screen choices
            1. Today
            2. Home
            3. Blank (use Ribbon bar)
        iii. Main Menu choices
            1. Touch Tiles – Looks like Windows 8, easy to use
            2. Quick Start – Simple interface for law students, volunteers

            3. Book – Use until comfortable with Tiles or Ribbon
            4. Blank (use Ribbon bar)
        iv. Different interfaces can be brought up at any time and used together
        v. Custom Pages make adding your own functions as easy as to the Book
            1. Admin
            2. Reports
            3. Search
            4. Add
        vi. Microsoft Access can be set up so that each form or report that is opened resides on its own tab.
    c. Calendar
        i. Multiple events entered from single calendar
        ii. Multiple people can be scheduled from a single calendar
        iii. Multiple people with multiple events scheduled from a single calendar
        iv. Calendars reports available in several places for
            1. Day
            2. Week
            3. Work Week
            4. Month
        v. Critical Date field on client record also creates a calendar event
        vi. Ability to tag a calendar event so a client can see it using the online status check
    d. Notes
        i. Continuous Case Notes
        ii. Ability to copy a note to other cases
        iii. Ability to print a single note
        iv. Ability to tag a note so a client can see it using the online status check
        v. Ability to read notes from oldest to newest or newest to oldest dates
        vi. Ability to filter by the note tag, e.g., Discussion with Client
        vii. Canned Notes
        viii. Canned Questions
    e. Speed Time and Notes
        i. Enter Time and/or Notes with the minimal number of keystrokes
        ii. Present on both the Today and Home screen
    f. Form letters
        i. Adjust the signature line for any staff member
        ii. Save the full text of the letter in Case Notes
        iii. Modify any part of the text including the basic text
        iv. Add your own text including canned notes
    g. Reports
        i. Report Creator
            1. Create Complex Reports
            2. Modify them on the fly
            3. Add Groups, Fields and Criteria

        4. Save for later use
    ii. Information about Reports stored in a single table. Entry here makes the report appear on:
        1. Search Screen with Preview
        2. Tree view with Preview
        3. Report Selector
    iii. An easy-to-use form allows you to add your own custom reports to the system. It also allows you to add a preview of the report.
    iv. Five Report packs included which add over 100 additional reports
        1. Staff Reports
        2. Graphic Reports
        3. PBI Reports
    v. A new report on referrals to agencies combines information from Clients and Callback records
    vi. A new report tallies self-help documents given to Clients
    vii. Many new and improved reports included
h. Clients Intake
    i. Improved interview system
        1. Simple to Use
        2. Link question lists to Problem Code, Special Problem Code, National Index code or custom lists, e.g. legal overview
    ii. Special Problem Codes expanded to accept 100 subdivisions
    iii. Super Duplication
        1. Duplicate Standard or Custom lists of Fields
        2. Duplicate Notes, Eligibility, and Family records
        3. Substitute values for certain fields (such as staff number) in the new record
    iv. Unlimited numbers of PBI Lawyers on a case
    v. New fields automatically compute
        1. Current client age
        2. Last Activity on the Case
        3. Last calendar slip creation date
        4. Last date a time slip was entered
        5. Last Notes entry on the case
        6. Client Unique Number
    vi. Multiple Main Benefits (Outcomes) Tab
        1. Any number of main benefits per case
        2. Track Recovery, Recovery Monthly, Number of Months
        3. Track Avoidance, Avoidance Monthly, Number of Months
        4. Track Value of Services
    vii. Litigation Expenses special program
    viii. Funding Code Analyzer
        1. Build funding code checks using 57 fields on the client and eligibility records

        2. Allow users to check for the correct funding code at the push of a button
        3. Allow an overall review of cases between two periods
        4. Tag funding codes with priorities and easily change these priorities

i. Eligibility
    i. Unlimited Adverse Parties on Eligibility that can move to Conflicts
    ii. Unlimited Income, Assets and Expenses on Eligibility
    iii. Custom intakes (Special Programs) supported by Eligibility
j. Improved Project Management
    i. Track complex litigation or complex activities
    ii. Don't reinvent the wheel
    iii. Set up tasks, track problems, budget money assign staff, calendar actions
    iv. Import old projects into new ones
k. Difficult/Dangerous People tracking protect your staff
    i. Track Clients
    ii. Track Applicants
    iii. Track Others
    iv. Documents up to 5 instances of wrongful client activities
    v. Have a recommended action when communicating with a specific difficult or dangerous person
    vi. Search for or enter difficult or dangerous people from
        1. Callback
        2. Clients
        3. Eligibility
        4. Search Screens
        5. Separately
    vii. Essential for programs with multiple offices or large offices
l. Lawyers
    i. Automatic computation on PBI Lawyer's record of
        1. Last date of Activity
        2. Total number of hours spent
        3. Total number of cases
        4. Number of cases taken in the last year
        5. Whether there is an ongoing case
        6. When a case was last taken
    ii. Canned Notes for Lawyers
m. Law Firms
    i. Anchor a case to a Law Firm on PBI
    ii. Automatic computation on Law Firm records of
        1. Number of Cases
        2. Number of Cases in the last year
n. New field store stores the county where the legal issue is on both Eligibility and Clients

o. Document Management documents can be stored either:
    i. In SQL Server or
    ii. As a path to their location
p. Search Screens
    i. Greatly increased search functions
        1. Greater than, Less than, Between, etc.
        2. More than 25 date filters
        3. Advanced filters
        4. Equal, Contains, does not contain, does not equal
    ii. All People Check
    iii. All Phones Check
    iv. Read and edit client notes on the search screen
    v. Export records to Excel
        1. Full Record or
        2. Only the fields displayed on screen
    vi. Send internal messages
    vii. Case Closure review sheet for the managing attorney
    viii. In Use indicators on the Search Screens
    ix. Speed Bar allows quick filtering of displayed information including
        1. Your staff number
        2. Your office
        3. Your unit
        4. Cases where you are the co-counsel
        5. Cases where you are the intake person
    x. Pop up summaries show
        1. PBI Lawyers Cases (Lawyers)
        2. The primary lawyer or all lawyers on a PBI case (ClientsPBI)
q. Other options
    i. LITC (low income tax clinic)software
    ii. VAWA Software
    iii. Attorney's fees software
    iv. HUD module
r. Grants Tracking software included
    i. Track Grants
    ii. Grantors
    iii. Grant Requirements
    iv. Calendar important events
    v. Budget the money spent
s. Conflicts
    i. Detailed information stored for
        1. Adverse party in Clients
        2. Adverse party on Eligibility
    ii. Alternate name conflict check for diminutive names
    iii. Use All Phones and All People search screens to conflict check

t. Time
    i. Multi-Time form allows multiple time records to be entered on one form
    ii. Time Pause form allows multiple time records to be opened and switched between.
    iii. Staff member time sheet can be printed out for time spent weekly, monthly, bi weekly or bi monthly.
    iv. Travel Expense can be tracked on Time
u. Send and receive emails files from within Prime using your organizations IMAP
v. Today Screen
    i. Daily worksheets for advocates, managers and PBI coordinators
    ii. Recommended Reports
    iii. Favorite Reports (Frequent)
    iv. Work Week Calendar generated for staff member, office, unit
    v. Internal (Case Collaborative Messaging)
w. Vault Allows saving of work on the front end in central location to
    i. Protect custom work
    ii. Share work
    iii. Propose modifications to master copy
x. Records in important tables protected from deletion
    i. Any record in 15 important tables first sent to backup table before deleted
    ii. Only administrator has access to these backup tables
    iii. Prevents any accidental or intentional deletions
y. Web based Option
    i. Prime Cloud about 90% of the functionality
    ii. A2J convertor allows entry of information directly into Prime
    iii. PBI Lawyer Portal
    iv. Client Status Check
z. Certain functions moved behind the protected Admin tab
    i. Trust
    ii. Donations (fund raising)
    iii. Grant tracking
    iv. Staff Member information
    v. Online Intake Screening
    vi. Many other functions supported here

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