

What's New in Primafact 5

Upgrade Feature Overview



Primafact 5 offers an array of new workflow and file review features designed to improve team efficiencies and maximize file knowledge.

A New Look

- ✓ Enhanced viewing features, including the new **Document Preview Pane** make it easier than ever to review documents. ... 2

Improved Case Knowledge Tools

- ✓ The **Details Screen** ramps up file review with “at a glance” access to key case details ... 3
- ✓ **Document List Views** flexibly filters & sorts documents so you can zero in on specific case content ... 4
- ✓ **Enhanced Annotation Issue Coding** lets you code by category for improved annotation assembly and review ... 5
- ✓ **List Export** quickly assembles lists of documents and annotations by select criteria (service status, exhibit numbers, witness prep issues and more) ... 5

Improved Team Efficiencies

- ✓ **In-app Messaging** keeps teams ‘in the loop’ with a record of document-related messages ... 7
- ✓ **Outlook Integration** lets you send email and attachments to Primafact for easier filing ... 8
- ✓ The **Filing Center** makes document intake and filing more efficient ... 9
- ✓ **Task Management** keeps you on top of your team’s document-related tasks ... 10
- ✓ **Auto-Complete** gets documents named faster and more accurately ... 11
- ✓ **Advanced Page Numbering** makes it easy to apply page numbering to document sets ... 11

Optional Mobility Add-On

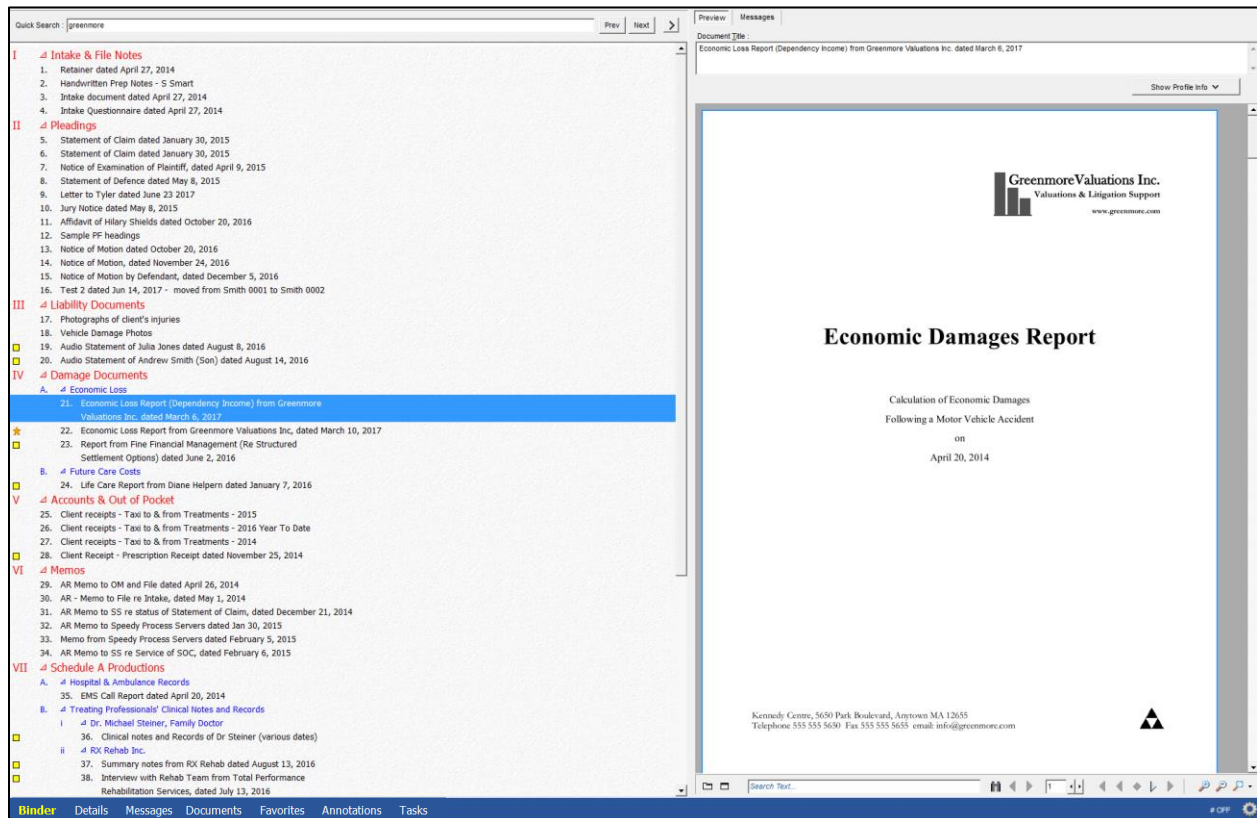
- ✓ **The Primafact Mobility Suite**, available for iOS and Android, keeps you connected with live access to your Case documents. On-the-go annotation, messaging and delegation tools keep teams productive while you’re off-site. ... 12

A New Look

Primafact 5 makes document management more convenient than ever with new viewing features designed to identify documents faster, with less effort.

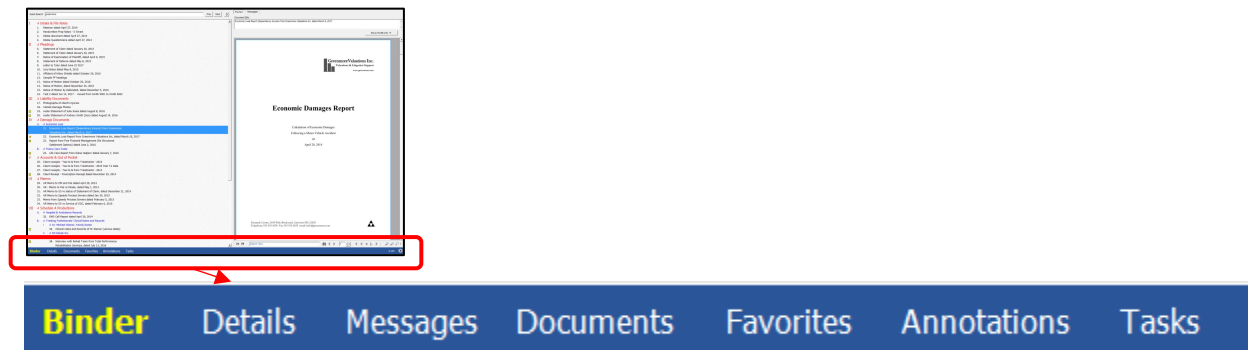
Preview Pane

The new preview pane displays your selected document alongside your index.



You can even create annotations directly in the preview.

Added views offer document grouping and filtering options that display case information in a way that's most relevant to you.

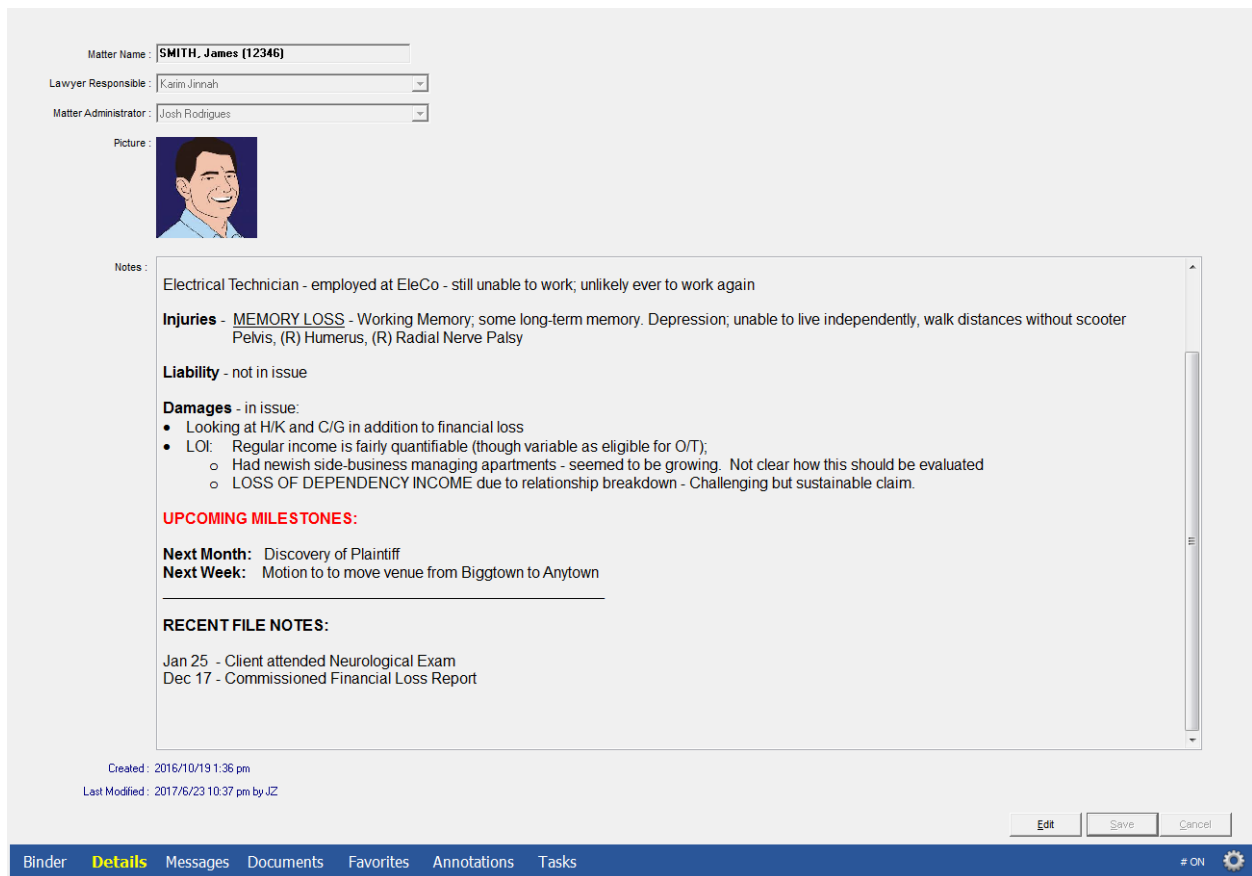


Improved Case Knowledge Tools

Primafact 5 offers flexible viewing tools that make it easier to build and review your case.

Case Details Screen

Get up to speed quickly with “at a glance” access to key file details, including space for a client photo.



The screenshot displays the 'Case Details Screen' in the Primafact 5 application. At the top, there are three dropdown menus: 'Matter Name' (SMITH, James (12346)), 'Lawyer Responsible' (Karin Jinnah), and 'Matter Administrator' (Josh Rodriguez). Below these is a 'Picture' field containing a cartoon image of a man. The main section is titled 'Notes' and contains the following text:

Electrical Technician - employed at EleCo - still unable to work; unlikely ever to work again

Injuries - **MEMORY LOSS** - Working Memory; some long-term memory. Depression; unable to live independently, walk distances without scooter
Pelvis, (R) Humerus, (R) Radial Nerve Palsy

Liability - not in issue

Damages - in issue:

- Looking at H/K and C/G in addition to financial loss
- LOI: Regular income is fairly quantifiable (though variable as eligible for O/T);
 - Had newish side-business managing apartments - seemed to be growing. Not clear how this should be evaluated
 - LOSS OF DEPENDENCY INCOME due to relationship breakdown - Challenging but sustainable claim.

UPCOMING MILESTONES:

Next Month: Discovery of Plaintiff
Next Week: Motion to to move venue from Biggtown to Anytown

RECENT FILE NOTES:

Jan 25 - Client attended Neurological Exam
Dec 17 - Commissioned Financial Loss Report

At the bottom left, it says 'Created : 2016/10/19 1:36 pm' and 'Last Modified : 2017/6/23 10:37 pm by JZ'. At the bottom right, there are 'Edit', 'Save', and 'Cancel' buttons. The bottom navigation bar includes 'Binder', 'Details' (highlighted), 'Messages', 'Documents', 'Favorites', 'Annotations', and 'Tasks'. On the far right of the bar, it says '# ON' and has a gear icon.

Document List Views

This new view lets you see all of your case documents with powerful searching and grouping features designed to identify and sort documents quickly.

Display selected document profile attributes for “at-a-glance” access to profile information such as document source and service history. You can quickly filter lists by title, keywords and profile content.

The screenshot displays the Document List Views interface. On the left, a list of documents is shown with columns for Thumbnail, Title, Flags, Pages, DocDate, Service Date, and Added. The selected document is "Economic Loss Report from Greenmore Valuations Inc, dated March 10, 2017".

Thumb	Title	Flags	Pages	DocDate	Service Date	Added
	Economic Loss Report (Dependency Income) from Greenmore Valuations Inc, dated March 6, 2017		15	2017-03-06	2017-06-27	2017-03-29
	Economic Loss Report dated June 9, 2016		7	2016-06-09	2016-07-21	2017-03-29
	Economic Loss Report from Greenmore Valuations Inc, dated April 20, 2016		15	2016-04-20	2016-07-21	2017-03-29
	Economic Loss Report from Greenmore Valuations Inc, dated March 10, 2017		15	2017-03-10	2017-06-27	2017-03-29
	EMS Call Report dated April 20, 2014		2	2014-04-20	2015-11-13	2017-03-29
	Imaging Report dated June 23, 2014		3	2014-06-23	2015-11-23	2017-03-29
	Imaging Report of Right Hand, dated September 13, 2014		1	2014-09-13	2015-11-23	2017-03-29

30 documents of 146. Filtered on keywords in quick filter.

On the right, the preview of the selected document is shown. It includes a header for "GreenmoreValuations Inc." and a table of economic damages.

	Low	High	(Schedule 1)
Past Income Loss	\$ 88,000	\$ 132,000	(Schedule 1)
Present Value of Future Income Loss	255,000	\$590,000	(Schedule 2)
Past Loss of Dependency Income	15,000	35,000	(Schedule 3)
Present Value of Future Loss of Dependency Income	160,000	365,000	(Schedule 3)

List Export instantly assembles lists of documents grouped and sorted by criteria such as service status, exhibit numbers, witness prep issues and more, so you can paste to Excel for reports and analysis.

Enhanced Annotation Coding

New Issue Coding tools make it easier to meaningfully assemble your reviewed materials. The Case Issue feature lets you create a Master issue list, and customizable issues for each case.

Coding Annotations by Issue

Improved features include more robust annotation form, with customizable fields and drop-down **Type** and **Issues** menus.

Document Markup - Page 1, Clinical notes and Records of Dr Steiner (various dates)

Annotation

MRI of head - performed 7 months pre-acc
Study - Normal
No findings to suggest acoustic neuroma
HEAD MRI WAS CONDUCTED DUE TO TINNITUS

Type : Analysis
Issues : Head - Other, Pre-Accident Imaging
Colour : Blue
Author : JOSH
Date : Jan 26, 2017
Source : Yellowstone Hosp Dept of Diagnostic Imaging
Reference Date : Sept 26 2014
Impact : Neutral (possible -ve inference - be on alert)

Clinical notes and Records of Dr Steiner (various dates)

Annotation Redaction Task Delete

Task :
Status :

☐ DAMAGES
☒ Caregiving
☒ Housekeeping
☒ Loss of Dependency Income
☒ Loss of Income
☒ Out of Pocket

☐ EVIDENTIARY VALUE
☒ Harmful
☒ Helpful
☒ Neutral

☐ INJURIES
☒ Closed Head
☒ Dominant Hand/Arm
☒ Humerus
☒ Insomnia
☒ Memory Loss
☒ Musco-Skeletal
☒ Pelvis
☒ Psychological
☒ Radial Nerve Palsy

☐ LIABILITY
☒ Contributory
☒ Defendant

☒ PRE-ACCIDENT HEALTH
☒ Anxiety
☒ Back Pain
☒ Depression
☒ Fractures
☒ Head - Other
☒ Headaches

2014-Oct-30

OK Cancel

Manage... OK

Reviewing Annotation Issues

The Annotations view is an interactive list that offers flexible options for grouping, sorting, and filtering annotations, for improved file preparation and review.

Quick Filter...

Type	Source	Reference Date	Impact	Title	Page #	Auth
DAMAGES - 26						
▶ Caregiving - 5						
▶ Loss of Dependency Income - 9						
▶ Loss of Income - 7						
Analysis	Greenmore Report	June 9, 2016	supports case - but needs careful present...	Economic Loss Report dated June 9, 2016	3	
			LOI upshot; check the numbers again to confirm assumptions	Economic Loss Report from Greenmore Valuations Inc, dated April 20, 2016	8	
			Mixed Benefit to case			
			Go back to other reports; this seems to be very low esp because cl was collecting overtime in his last year of work;	Economic Loss Report from Greenmore Valuations Inc, dated April 20, 2016	7	
			also what about the sideline of apartment management; this had the potential to be very lucrative			
Highlight			Undermines Case			
			Loss of Care	Economic Loss Report dated June 9, 2016	6	
Highlight			Supports Case			
			Get more CRA data - ever report this income?	Economic Loss Report from Greenmore Valuations Inc, dated March 10, 2017	6	
			"(e) In addition to his work at EleCo, that he acted as a property manager for several rental units,"			
Analysis			Supports Case			
			Independent side business managing rental units	Life Care Report from Diane Helpert dated January 7, 2016	5	
			POTENTIAL to be very helpful			
Analysis						

87 annotations are showing in 136 rows.

Binder Details Messages Documents Favorites **Annotations** Tasks # ON

Document Title : Economic Loss Report dated June 9, 2016

Show Profile Info

Preview Messages

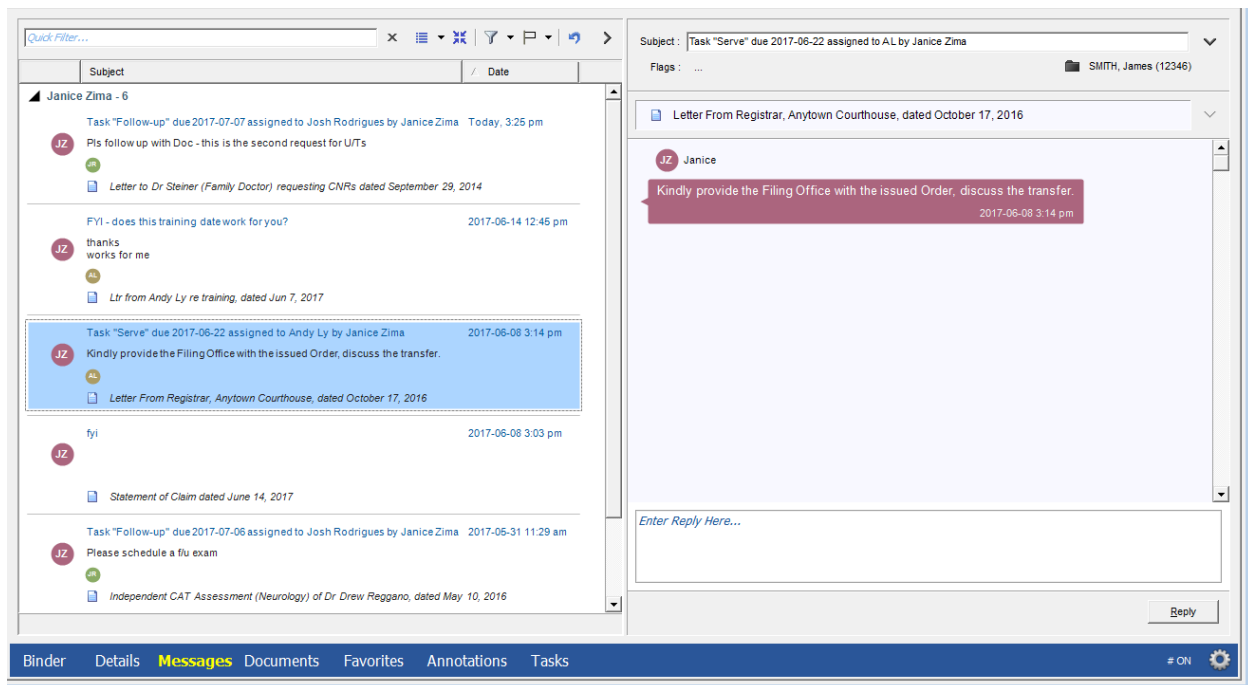
Filtered lists can be copied to Excel for detailed analysis and review, such as preparing a list of issues for witness preparation, or reviewing pre-accident health or development of a specific head of damages.

Improved Team Efficiencies

In-App Messaging

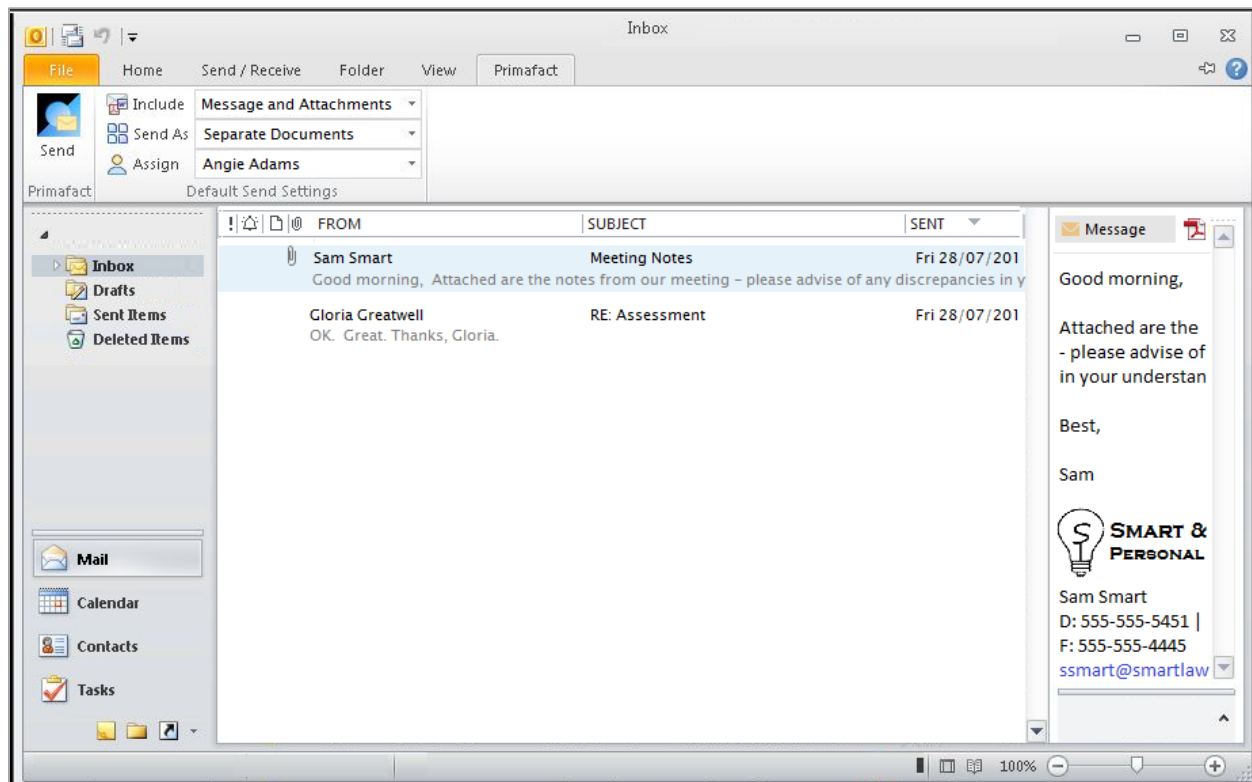
Primafact's new In-App Messaging make it easy for teams to communicate about Primafact documents, using easy-to-manage inboxes within Primafact, reducing email load.

Messages stay connected to documents for team review (teams can view messages attached to documents even if they did not send or receive the messages), preserving document messaging history.

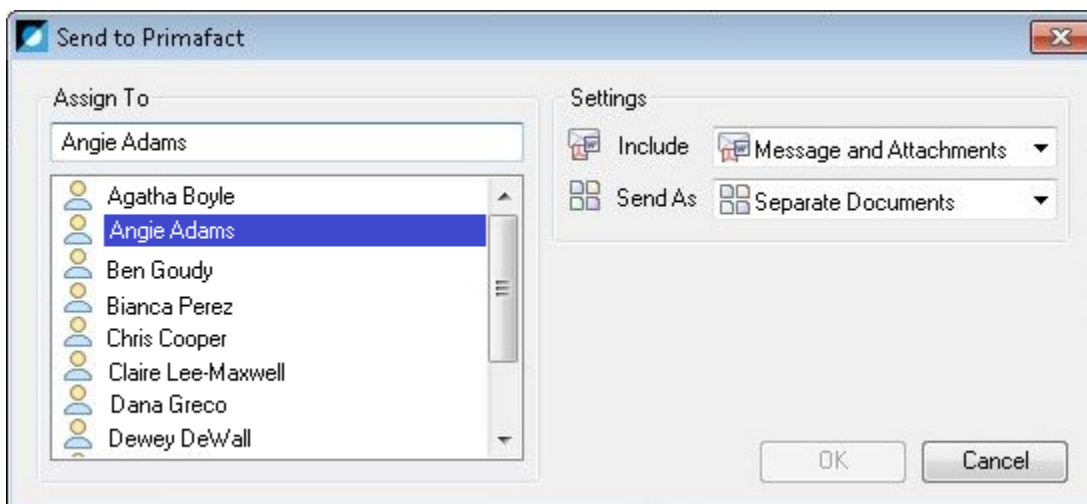


Outlook Integration

Primafact now integrates more seamlessly with Outlook, allowing users to **drag & drop Outlook messages** directly to Primafact. Primafact's import engine converts .msg files to native Primafact documents so you no longer have to convert to PDF or Print to Primafact to manage your emails as native Primafact documents.



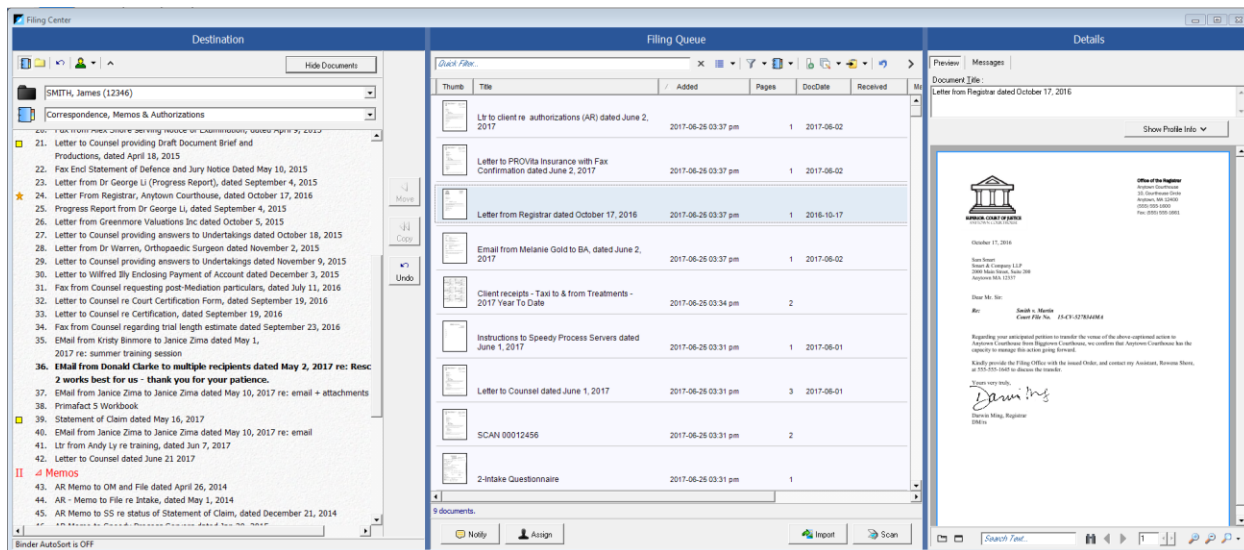
For improved workflow the new **Send to Primafact** Outlook plug-in lets users send emails and attachments directly to their assistant's Filing Queue – so the original email gets filed without added forwarding headers.



Filing Center

Primafact's Filing Center is designed to streamline new document intake. This separate Primafact window is divided into three sections:

- ✓ Filing Queue (list of new inbound documents for filing)
- ✓ Preview pane (speeds up document identification and naming)
- ✓ Destination pane (lets users readily file the document without leaving the Filing Queue)



The Filing Center integrates with Primafact's new **in-app document messaging**, making it easy to notify file owners that new documents have arrived. The **Assign** button makes it easy to redirect documents to the proper handler for filing.

Batch coding capability makes it easy to group documents for more efficient processing.

Task Management

New Task Management tools let you create and manage tasks linked to your case documents.

You can assign tasks to yourself or other users, along with a due date and instructions. Colour-code for ease of identification. You can even code by issue to consolidate issue-related activities.

The screenshot shows a 'Document Markup' window titled 'Page 3, Report from Fine Financial Management (Re Structured Settlement...)'. The task is 'Due in 4 Days'. The main text area contains a paragraph about 'Loss of Dependency Income Calculations'. Below this, there are several dropdown menus and text fields for task configuration:

- Type: Analysis
- Issues: Loss of Income
- Colour: Yellow
- Author: KARIM
- Date: Jun 1, 2017
- Source: Greenmore
- Reference Date: (empty)
- Impact: Pivotal Point for LDE Claim
- Task: Follow-up
- Status: Not Started
- Task requires approval: ☒
- Assigned by: Karim
- Assigned to: Josh
- Due Date: Jun 21, 2017

At the bottom, there are buttons for 'Annotation', 'Redaction', 'Task', 'Delete', 'Pause', 'OK', and 'Cancel'. A status bar at the bottom indicates 'Report from Fine Financial Management (Re Structured Settlement Options) dated June 2, 2016' and '2016-Jun-02'.

All Tasks assigned to a Case can be reviewed on the **Task View** of that case. Users can all see all of their own global Primafact tasks (including tasks they have delegated or created) on their **My Tasks** tab.

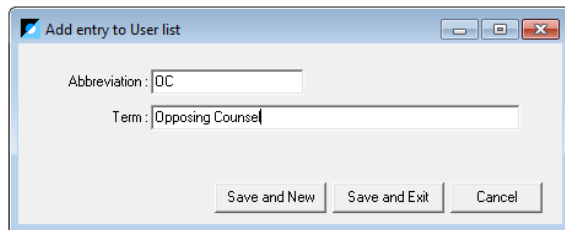
The screenshot shows the 'Task View' window for a case titled 'Economic Loss Report from Greenmore Valuations Inc, dated March 10, 2017'. The window has a 'Quick Filter' bar and a 'Preview' tab. The main area displays a list of tasks with columns for Type, Status, Due Date, Assignee, Creator, Created, and Modified. The tasks are grouped by due date: 'OVERDUE - 18', 'Next Week - 3', and 'Next Month - 4'. The tasks are as follows:

Type	Status	Due Date	Assignee	Creator	Created	Modified
Follow-up	Not Started	2017-06-27	Andy	Janice	2017-06-08	2017-06-25
Review	Done	2017-06-26	Janice	Animate	2016-10-26	2017-06-25
Serve	Not Started	2017-06-29	Janice	Animate	2016-11-15	2017-06-25
Follow-up	Not Started	2017-07-03	Janice	Animate	2016-11-25	2017-06-25
Follow-up	Done	2017-07-03	Janice	Animate	2017-01-26	2017-06-25
Follow-up	Not Started	2017-07-11	Janice	Animate	2017-01-27	2017-06-25
Follow-up	In Process	2017-07-27	Josh	Janice	2017-06-31	2017-06-31

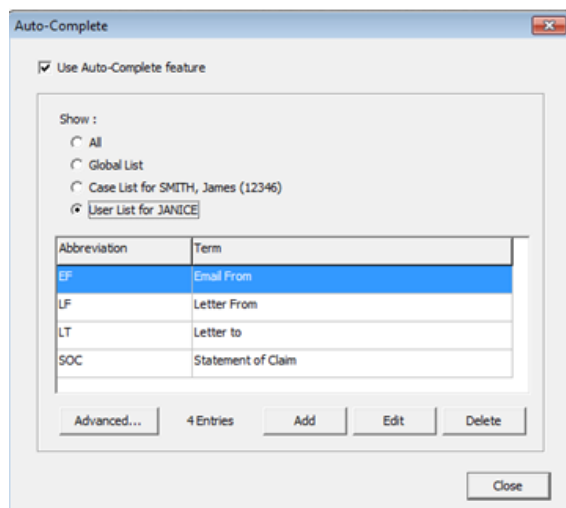
The right side of the window shows a 'Preview' tab with a document titled 'Economic Loss Report from Greenmore Valuations Inc, dated March 10, 2017'. The document content is visible, showing sections like 'PLAINTANT'S STATEMENT', 'DEFENDANT'S STATEMENT', and 'CALCULATION OF ECONOMIC LOSS'.

Auto-Complete

Set up auto-complete entries at the Global, Case, or user level to speed up document naming and other text input. Create customized “shortcuts” that expand to specified words and phrases – e.g. *LT* = “*Letter to*”; “*SOC*” = “*Statement of Claim*”; “*OC* = *Opposing Counsel*” etc.



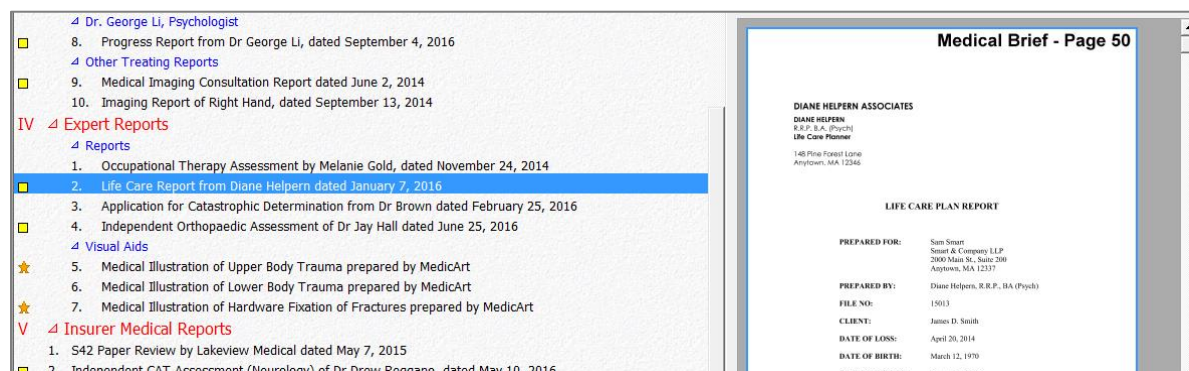
Lists can be shared among team members using export and import tools.



Binder Page Numbering

Easily apply page numbering to entire binders (or tabs, or sections) in a single operation. New numbering options allow you to number entire binders, tabs, or sections from beginning to end, (You can continue to number documents individually starting at Page 1 if you prefer.)

Enabled binder numbering automatically adjusts to accommodate added, removed, or re-ordered documents. The same document may be assigned different page numbers (at the same time) in different binders.



Medical Brief - Page 50

DIANE HELPERT ASSOCIATES
DIANE HELPERT
R.R.P., R.A., (Psych)
Life Care Planner
148 Pine Forest Lane
Andover, MA 01810

LIFE CARE PLAN REPORT

PREPARED FOR: Sam Smart
Smart & Company LLP
2000 Main St., Suite 200
Andover, MA 01810

PREPARED BY: Diane Helpert, R.R.P., R.A. (Psych)

FILE NO: 15013

CLIENT: James D. Smith

DATE OF LOSS: April 20, 2014

DATE OF BIRTH: March 12, 1970

DATE OF REPORT: June 2, 2016

Primafact Mobility Suite

(Optional Add-In)

The Primafact Mobility Suite, a separate module available for iOS and Android, keeps you connected with live access to your Case documents. On-the-go annotation, messaging and delegation tools keep teams productive while you're off-site.

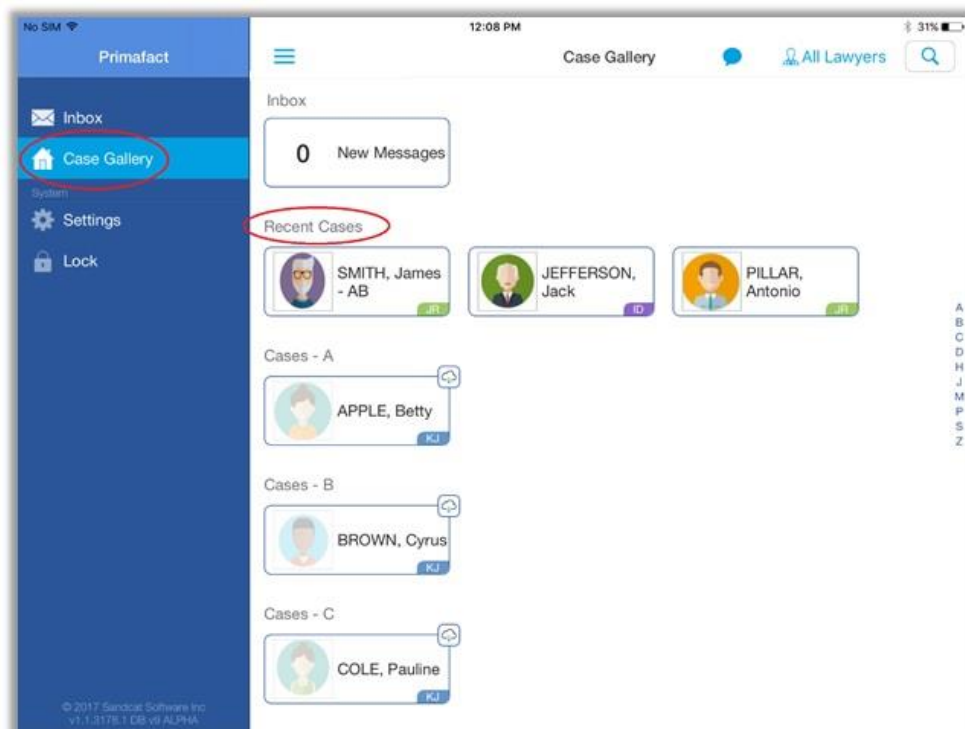
Stay Productive

Designed with the busy litigator in mind, Primafact's mobility suite offers context-appropriate tools to keep you effectively in touch with your live case documents from your favorite mobile device.

Review documents, share files, make annotations and collaborate with staff in real-time from your iPhone, iPad, or Android device.

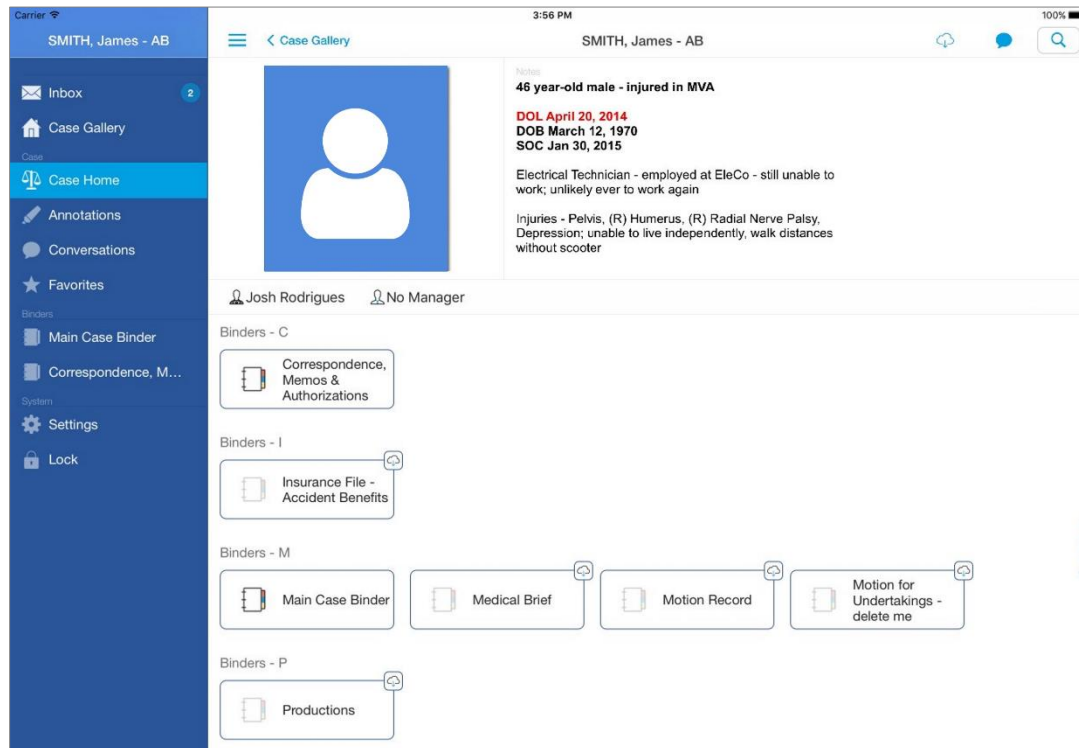
Case Gallery

The Case Gallery displays all your cases, recent cases, and the number of new messages you have in your Primafact Inbox:



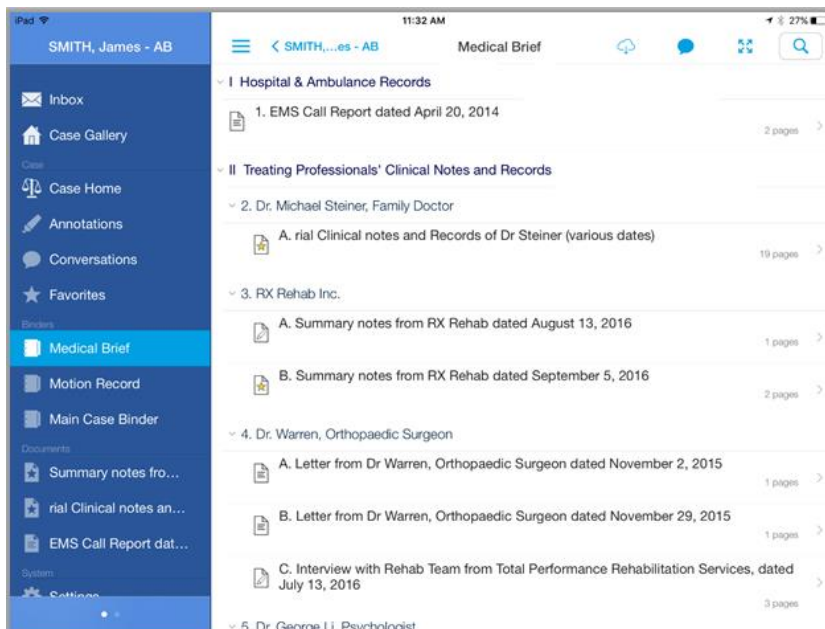
Case Overview

Familiarize yourself with key case details from the Case Home screen:



Easy Document Access

Viewing a document is quick and easy too. Simply tap on a Binder in your selected Case to see your documents organized in Primafact's familiar Trial Binder view.



Tap to open any document, with up-to-date Annotations, Conversations (in-app messaging) and Document Profile information at your fingertips:

The screenshot displays the Primafact 5 mobile application interface. On the left is a blue sidebar menu with options like 'Inbox', 'Case Gallery', 'Case Home', 'Annotations', 'Conversations', 'Favorites', 'Main Case Binder', and 'Correspondence, M...'. The main area shows a 'Medical Imaging Consultation Report dated June 2, 2014' for 'SMITH, James - AB'. The report includes patient information (Name: James D. Smith, DOB: 12/03/1970, Age: 44, Sex: M), exam details (Acct: BD0198741, Exam Date: 02/06/2014, Unit No: H008765432), and a table with columns 'EXAM#', 'TYPE/EXAM', and 'RESULT'. The 'CLINICAL HISTORY' section is highlighted with a yellow box. The 'FINDINGS' section describes the CT scan results. On the right, a 'Show All' panel lists 'Client Materials' and 'Document Review' for the same patient. At the bottom, there are icons for 'Annotations', 'Conversations', and 'Profile Fields'.

Stay in Touch

Easily review Conversations, send and receive Primafact messages to provide input and keep on top of files – anywhere your practice takes you.

