

PracticeMaster Report Pack



Tabs3 Billing



PracticeMaster



Trust Accounting



Accounts Payable




General Ledger

PracticeMaster Report Pack

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Version 2023 (Monday, January 1, 2024)

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Optional Report Footer

Footer

Print Footer

Print User Initials

Print Horizontal Ruling Line

The software can be configured to include an optional footer on the reports. The footer includes the day of the week, date, and time the report is printed. You can optionally include a horizontal ruling line and the initials of the User ID who prints the report.

The footer is configured at the printer level for each workstation in the Advanced Printing Options window (**File | Print Setup | Advanced Printing Options**).

The following is an example of a footer with the user initials and horizontal ruling line.

MLJ	Tuesday 08/23/2022 9:51 am
-----	----------------------------

Area of Practice List

Date: 08/23/2022	Area of Practice List Jensen, Martin & Anderson, P.C.	Page: 1	
Name	Description	Files	Template Path
CMSYSTEM	System Files	24	CMSYSTEM\DOCS\
WC	Workers' Compensation	8	WC\DOCS\
FAMILY	Family Law	11	FAMILY\DOCS\
CRIMLAW	Criminal Law	7	CRIMLAW\DOCS\
ADMIN	Administrative/Personnel	3	ADMIN\DOCS\
BUSLAW	Business Law	12	BUSLAW\DOCS\
CONT_ED	Continuing Education	2	CONT_ED\DOCS\
FORECLOS	Foreclosure Law	10	FORECLOS\DOCS\
PI	Personal Injury Law	10	PI\DOCS\
PROBATE	Probate Law	20	PROBATE\DOCS\
REALEST	Real Estate Law	8	REALEST\DOCS\
WILLS	Wills and Trusts Law	17	WILLS\DOCS\

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The Area of Practice List includes all of the Areas of Practice present in PracticeMaster. This report cannot be modified.

Category List

Date: 08/23/2022		Category List	Page: 1
		Jensen, Martin & Anderson, P.C.	
Category Number	Code Set	Description	
1		Personal Injury	
5		Wills/Trusts/Estates	
10		Workers' Compensation	
15	P	Probate	
20		Tax Law	
25		Real Estate	
30	B	Foreclosure	
35		Family Law	
40	L	Business Law	
45		Trademarks/Copyrights/Patents	
50		Criminal Law	
55	L	Insurance Defense	
60	L	General Litigation	

Date: 08/23/2022		Category List	Page: 1
		Jensen, Martin & Anderson, P.C.	
Category Number	Code Set	Description	
40	L	Business Law	
50		Criminal Law	
35		Family Law	
30	B	Foreclosure	
60	L	General Litigation	
55	L	Insurance Defense	
1		Personal Injury	
15	P	Probate	
25		Real Estate	
20		Tax Law	
45		Trademarks/Copyrights/Patents	
5		Wills/Trusts/Estates	
10		Workers' Compensation	

Report Writer Name **CATEGORY**

Categories are used to classify fee services into related groups for purposes of determining productivity for each category of work. The Category List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all categories present in PracticeMaster. It can be generated in alphabetical order based on the category description or numerical order based on the category number. When integrating with Tabs3 Billing, categories are added and modified in Tabs3.

Timekeeper List

08/23/2022		PracticeMaster Numeric Timekeeper List Jensen, Martin & Anderson, P.C.		Page: 1
Timekeeper Number	Init.	Name	Rate	
1	MLJ	Michael L. Jensen	250.00	
2	PAM	Paula Ann Martin	225.00	
3	RPA	Ronald P. Anderson	160.00	
4	ROB	Robert O. Burns	200.00	
5	KIM	Kendra I. Michaels	150.00	
6	DHB	Daniel H. Brady	70.00	
7	CB	Cheryl Bradley	65.00	
8	JAN	Jennifer A. Noonan	100.00	
9	JIM	Jason I. Masterson	150.00	
10	JPP	Jimmy P. Praum	50.00	
39	OLD	*Old / Archived Timekeepers		

Report Writer Name **TMKRLIST**

The Timekeeper List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all timekeepers present in PracticeMaster. An * next to the timekeeper's name indicates the timekeeper is marked as an inactive timekeeper. It can be generated in alphabetical or numerical order. The alphabetical list sorts the timekeepers in alphabetical order by last name. When integrating with Tabs3 Billing, timekeepers are added and modified in Tabs3.

Location List

Date: 08/23/2022		Location File List Jensen, Martin & Anderson, P.C.		Page: 1
Location ID	Description			
DM	Des Moines Office			
Lincoln	Lincoln Office			
Omaha	Omaha Office			

Report Writer Name **LOCATION**

The Location List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all locations present in PracticeMaster. When integrating with Tabs3 Billing, locations are added and modified in Tabs3.

Text Macro List

Date: 08/23/2022

Text Macro List
Jensen, Martin & Anderson, P.C.

Page: 1

Macro ID	Text
ATT	attended
CA	court appearance
CCT	carbon copy to:
CF	courier fee
COM	communicate with
CRTA	court appearance
DAR	draft and revise
DOM	<i>Petition for Dissolution of Marriage</i> and related documents
EN	enclosure
FF	filing fee
INT	interrogatories
INTDOC	<i>Interrogatories and Request for Production of Documents</i>
INV	investigation of
LD	long distance telephone charges
LM	left message
LR	legal research
LT	letter to
LWT	<i>Last Will and Testament</i>
MED	medical records
ML	mileage to/from
MSJ	<i>Motion for Summary Judgement</i>
NOA	<i>Notice of Appearance</i>
NONPAY	concerning past due balance. Discussed setting up a monthly payment schedule. No more work will be done until a good faith payment is made.
OC	office conference with
OLR	online legal research
OPF	outside professional fee
OPP	opposing counsel
OPPDOC	opposing counsel regarding discovery and production of documents
OSC	outside conference with
PNG	<i>Plea of Not Guilty</i>
PP	plan and prepare for
RA	review and analyze
RO	receipt of
RQ	requested
SETT	terms of settlement and receipt of settlement check
SF	sheriff's fee
ST	spoke to
TC	telephone conference with
TDS	to discuss current status and issues relating to the case.
TE	trial exhibits
TRX	travel expense
TT	talked to
VM	voice mail

Report Writer Name **MACRO**

Text macros consist of a Macro ID and associated replacement text. Whenever the Macro ID is typed followed by a space, it is automatically replaced with the associated text. The Text Macro List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all text macros present in PracticeMaster.

Transaction Code List

Date: 08/23/2022

Transaction Code List
Jensen, Martin & Anderson, P.C.

Page: 1

Tcode	Alpha Code	Description
1	FEE	
2	OSC	Outside conference with
3	TC	Telephone conference with
4	OF	Open file
5	LT	Letter to
6	REC	Receipt of
7	PP	Plan and prepare for
8	DAR	Draft and revise
9	RA	Review and analyze
10	LR	Legal research
11	CA	Court appearance
12	INV	Investigation of
13	ATT	Attended
14	COM	Communicate with
15	UP	Update files/records
16	OCW	Office conference with
17	WO	Write off per
18	MIS	(miscellaneous fee)
19	IM	Initial meeting.
20	NB	Non-billable time
21	DES	(description only)
22	PF	(progress fee)
23	DP	Deposition of
24	RR	Receipt and review of email
100	MA	(miscellaneous advance)
101	PRO	Processor fee
102	CF	Courier fee
103	OPF	Outside professional fee
104	MED	Medical records
105	SF	Sheriff's fee
106	OLR	Online legal research
107	TRA	Transcription fees
108	EX	Trial exhibits
109	FF	Filing fee
110	DOC	Document preparation/typing
111	LAT	Late Fees
250	LD	Long distance telephone charges
251	COP	Photocopy charges
252	ML	Mileage to/from
253	POS	Postage
254	TEX	Travel expense
255	FAX	Fax
256	ME	(miscellaneous expense)
900	PYM	Payment

Report Writer Name **TCODE**

A transaction code is a number used to represent or describe a type of service, activity, cost or payment. The Transaction Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all transaction codes present in PracticeMaster. It can be generated in alphabetical or numerical order. When integrating with Tabs3 Billing, transaction codes are added and modified in Tabs3.

Task Code List

Date: 08/23/2022

Task Code List
Jensen, Martin & Anderson, P.C.

Page: 1

Phase	Activity ID	Tcode	Description
	A101	7	Plan and prepare for
	A102	10	Research
	A103	8	Draft/revise
	A104	9	Review/analyze
	A105	14	Communicate (within legal team)
	A106	14	Communicate (with client)
	A107	14	Communicate (opponents/other outside counsel)
	A108	14	Communicate (other external)
	A109	13	Appear for/attend
	A110	15	Manage data/files/documentation
	A111	18	Other
	A112	254	Billable Travel Time
	A113	14	Communicate (witnesses)
	A114	14	Communicate (experts)
	A115	15	Medical Record and Medical Bill Management
	A116	10	Training
	A117	15	Special Handling Copying/Scanning/Imaging (Internal)
	A118	12	Collection-Forensic
	A119	15	Culling & Filtering
	A120	15	Processing
	A121	15	Review and Analysis
	A122	9	Quality Assurance and Control
	A123	10	Search Creation and Execution
	A124	15	Privilege Review Culling and Log Creation
	A125	8	Document Production Creation and Preparation
	A126	7	Evidence/Exhibit Creation and Preparation
	A127	7	Project Management
	A128	9	Collection Closing Activities
	B100	0	Administration
	B110	0	Case Administration
	B120	0	Asset Analysis and Recovery
	B130	0	Asset Disposition
	B140	0	Relief from Stay/Adequate Protection Proceedings
	B150	0	Meetings of and Communications with Creditors
	B160	0	Fee/Employment Applications
	B170	0	Fee/Employment Objections
	B180	0	Avoidance Action Analysis
	B185	0	Assumption/Rejection of Leases and Contracts
	B190	0	Other Contested Matters (excluding assumption/rejection motions)
	B195	0	Non-Working Travel

Report Writer Name **TASKCODE**

Task Codes are alphanumeric codes used to identify stages of work and activities performed when working with task-based billing. The Task Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all task codes present in PracticeMaster. When integrating with Tabs3 Billing, task codes are added and modified in Tabs3.

Calendar Code List

Date: 08/23/2022		Calendar Code List	Page: 1
		Jensen, Martin & Anderson, P.C.	
<u>Cal Code</u>	<u>Desc</u>		
AD	Answer to complaint due		
Anniv	Anniversary		
Appoint	Appointment with		
Attend	Attend		
BDAY	Birthday		
Bk	Breakfast		
BL	Business luncheon with		
CD	Closing Date		
CI	Confirmation of Issues		
CLE	Continuing Legal Education		
CM	Client Meeting		
Con	Continuance		
Cons	Consultation		
CS	Confirmation of Service		
DD	Discovery Due		
Dep	Deposition of		
Dinner	Dinner with		
DPM	Deadline for Hearing Dispositive Pretrial Motions		
DPW	Disclosure of Possible Primary Witnesses		
DRW	Disclosure of Possible Rebuttal Witnesses		
FC	File Complaint		
FD	Filing Deadline		
Firm	Firm Meeting		
Foll	Follow up with		
Hearing	Hearing		
ICM	Initial Client Meeting		
IO	Investigation of		
JSE	Joint Statement of Evidence		
Jury	Jury Selection		
LD	Limitation Date		
Lunch	Luncheon with		
Med	Mediation		
Memo	Send memo to		
MW	Meeting With		
OC	Office conference with		
Out	Out of Office		
OutCW	Outside conference with		
PC	Pretrial Conference		
PE	Personal Event		
PM	Partners Meeting		
Prep	Prepare for		
PT	Personal Task		
RD	Renewal date		
Research	Research		
Rev	Review		
Sem	Seminar		
Sick	Sick Time		
TaxesDue	Tax Return Deadline		
TCD	Trial Confirmation Date		
TP	Tax Planning		
trial	In trial at		
TT	Travel Time		

Report Writer Name **CAL_CODE**

A calendar code is a code that is used to categorize various types of calendar activity. The Calendar Code List is a Report Writer report included with PracticeMaster and can be modified as desired. This report displays all calendar codes present in PracticeMaster.

Master Client List

Date: 08/23/2022		Master Client List				Page: 1	
		Jensen, Martin & Anderson, P.C.					
Case Range:	to						
Attorney Range:	1 to 999						
Administrative Account							
1.00		For tracking all Firm and interest adjustments					MLJ
Larson/Michael 123 Washington St. Lincoln, NE 68508							
100.00	WC	Larson v. Bel-Cor		Larson/Michael	402-474-4651		MLJ
Williams/John 21225 Amberwood Chicago, IL 60662							
101.00	CRIMLAW	State v. Williams		Williams/John	770-598-2354x45691		PA
Gilbert/Andrew C. 8974 Weatherby Road Roswell, NM 88277							
102.00	PI	Auto Accident		Gilbert/Andrew C.	929-885-9055		PA
Klein/Daniel P. 795 North Apple Sacramento, CA 98654							
120.01	WC	Klein vs. Simmons Construction		Klein/Daniel P.	916-665-9889		RP
Phillips/Marcus 27550 Cottonwood Drive San Bernardino, CA 92408							
121.01	REALEST	Real Estate Acquisition		Phillips/Marcus	909-884-7525		MLJ
Peterson Insurance Co. 5th & Turner Malcolm, NE 68633							
200.01	BUSLAW	General Legal Counsel		Franklin/Paul	402-435-1739x512		MLJ
Peterson Insurance Co. 5th & Turner Malcolm, NE 68633							
200.02	ADMIN	Maintenance of Insurance Policies		Franklin/Paul	402-435-1739x512		RP
MegaConstruction Corporation 3 Building Center, Suite 2100 201 E 48th Street Manhattan, NY 10017-1538							
415.00	BUSLAW	Corporate Merger - Megabuilders and BuilderCorp		Tatiki, Sr./James R.	212-555-1232		RP
Olson/Gary J. 245 19th Street SW Lincoln, NE 68519							
600.00		Last Will & Testament		Olson/Gary J.	402-423-7788		MLJ
White/Kelly 201, 122nd Avenue East Los Angeles, CA 98507							
850.00	FAMILY	Divorce		White/Kelly	213-474-4336		KIM

Report Writer Name CLNTLST

The Master Client List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all clients present in PracticeMaster. The report can be generated for a range of Client IDs and primary timekeepers. It can optionally be printed in primary timekeeper order. Clients are listed in Client ID order. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Area of Practice Client List

Date: 08/23/2022		Area of Practice Client List			Page: 1	
Client Range: to		Jensen, Martin & Anderson, P.C.			Client Order: Numerical	
Area of Practice Range: to ZZZ					Area of Practice Order: Yes	
Timekeeper Range: 1 to 999					Timekeeper Order: No	
Date Range: mm/dd/yyyy to mm/dd/yyyy						
Area of Practice: ADMIN - Administrative/Personnel						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
200.02	ADMIN	Peterson Insurance Co.	Maintenance of Insurance Policies	05/24/2022		RP
Area of Practice: BUSLAW - Business Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
200.01	BUSLAW	Peterson Insurance Co.	General Legal Counsel	04/27/2022		MLJ
415.00	BUSLAW	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	07/19/2022		RP
Area of Practice: CRIMLAW - Criminal Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
101.00	CRIMLAW	Williams/John	State v. Williams	05/28/2022		PA
Area of Practice: FAMILY - Family Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
850.00	FAMILY	White/Kelly	Divorce	07/18/2022		KIM
Area of Practice: PI - Personal Injury Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
102.00	PI	Gilbert/Andrew C.	Auto Accident	04/20/2022		PA
Area of Practice: REALEST - Real Estate Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
121.01	REALEST	Phillips/Marcus	Real Estate Acquisition	03/28/2022		MLJ
Area of Practice: WC - Workers' Compensation						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
100.00	WC	Larson/Michael	Larson v. Bel-Cor	06/24/2022		MLJ
120.01	WC	Klein/Daniel P.	Klein vs. Simmons Construction	07/23/2022		RP
Area of Practice: WILLS - Wills and Trusts Law						
Client ID	AOP	Client Name	Description	Date Opened	Pri	Tkp
300.00	WILLS	McBride/John	Management of Estate Trust	04/21/2022		MLJ
850.02	WILLS	White/Kelly	Medical Care of Brianne	07/15/2022		PA
850.01	WILLS	White/Kelly	Last Will & Testament	08/19/2022		KIM
Total Clients: 12						

Report Writer Name **AOP_CLNT**

The Area of Practice Client List is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes all clients and can be displayed in alphabetical or numerical order. This report can be generated for a specified range of Clients IDs, Areas of Practice, timekeepers, and open dates. Clients can optionally be sorted by Area of Practice and timekeeper. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Alphabetical Client List

08/23/2022	Alphabetical Client List Jensen, Martin & Anderson, P.C.		Page: 1
Client Name	Client ID	Description	
Administrative Account	1.00	For tracking all Firm and interest adjustments	
Gilbert/Andrew C.	102.00	Auto Accident	
Klein/Daniel P.	120.01	Klein vs. Simmons Construction	
Larson/Michael	100.00	Larson v. Bel-Cor	
McBride/John	300.00*	Management of Estate Trust	
MegaConstruction Corporation	415.00	Corporate Merger - Megabuilders and BuilderCorp	
Peterson Insurance Co.	200.01	General Legal Counsel	
Peterson Insurance Co.	200.02	Maintenance of Insurance Policies	
Phillips/Marcus	121.01	Real Estate Acquisition	
White/Kelly	850.00	Divorce	
White/Kelly	850.01	Last Will & Testament	
White/Kelly	850.02	Medical Care of Brianne	
Williams/John	101.00	State v. Williams	
Total Clients: 13			
An asterisk (*) printed after the Client ID indicates the client is inactive.			

Report Writer Name *CLNTLIST*

The Alphabetical Client List is a Report Writer report included in PracticeMaster and can be modified as desired. This list can be generated for a specified range of Client IDs. Clients are listed in alphabetical order and files for each client are listed in Client ID order. This list can be printed for active clients, inactive clients or both. The report shown above is printed for both. When both inactive and active clients are included on the report, an asterisk (*) is printed after the Client ID for those clients that are inactive. A footer is displayed at the end of the report indicating the number of clients and text regarding the asterisk and inactive clients. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Client Mailing Labels

<input type="radio"/>	Richardson/Harold 1548 West 57th Street Rochester NY 14603-8409	<input type="radio"/>
<input type="radio"/>	Martin/Mary L. & Fred J. 4200 Goldenrod Circle Omaha NE 68113	<input type="radio"/>
<input type="radio"/>	Klein/Daniel P. 795 North Apple Greenwood NE 68366	<input type="radio"/>
<input type="radio"/>	Carter/Arthur J. 4920 Everett Lincoln NE 68503	<input type="radio"/>
<input type="radio"/>	McBride/John Eastmont Towers 2920 Northwest Greenbriar Lane Lincoln NE 68505	<input type="radio"/>
<input type="radio"/>		<input type="radio"/>

Report Writer Name **LABEL1X4**

Client mailing labels can be generated using the Report Writer included with PracticeMaster with a 1" by 4" label format. This report is sorted by zip code in Client Name order and allows you to specify a range of Client IDs. As with all Report Writer reports, you can modify this report to meet your needs. For example, you can add a Selection Expression to only select specified clients. Or, as another example, you can add a Selection Expression to only select clients whose **Date Opened** field is greater than 01/01/16.

Client List by Primary Timekeeper

Date: 08/23/2022		Client List by Primary Timekeeper		Page: 1
Jensen, Martin & Anderson, P.C.				
Client Range:	to			
Timekeeper Range:	1 to 5			
Timekeeper:	1	Michael L. Jensen		
Client ID:	Client Name	Description	Count	
1.00	Administrative Account	For tracking all Firm and interest adjustmen	1	
100.00	Larson/Michael	Larson v. Bel-Cor	1	
121.01	Phillips/Marcus	Real Estate Acquisition	1	
200.01	Peterson Insurance Co.	General Legal Counsel	1	
300.00	McBride/John	Management of Estate Trust	1	
Client Count			5	
Timekeeper:	2	Paula Ann Martin		
Client ID:	Client Name	Description	Count	
101.00	Williams/John	State v. Williams	1	
102.00	Gilbert/Andrew C.	Auto Accident	1	
850.02	White/Kelly	Medical Care of Brianne	1	
Client Count			3	
Timekeeper:	3	Ronald P. Anderson		
Client ID:	Client Name	Description	Count	
120.01	Klein/Daniel P.	Klein vs. Simmons Construction	1	
200.02	Peterson Insurance Co.	Maintenance of Insurance Policies	1	
415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and Build	1	
Client Count			3	
Timekeeper:	5	Kendra I. Michaels		
Client ID:	Client Name	Description	Count	
850.00	White/Kelly	Divorce	1	
850.01	White/Kelly	Last Will & Testament	1	
Client Count			2	
Total Clients			13	

Report Writer Name **CLNT_TK**

The Client List by Primary Timekeeper is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a specified range of Client IDs and primary timekeepers. Clients are sorted by primary timekeeper and are listed in Client ID order. A count of clients is displayed for the entire report as well as a subtotal count for clients for each primary timekeeper. When including a subtotal count on a report, a separate Count column must be used. Drill-down editing capabilities allow you to edit records directly from the Preview window.

File Definition Report

Date: 08/23/2022		File Definition										Page: 1	
		Jensen, Martin & Anderson, P.C.											
AOP Name	: CMSYSTEM												
AOP Description	: System Files												
File Name	: CMCAL												
File Description	: Calendar												
File Type	: Variable												
Fixed Record Size	: 539												
Number of indexes	: 15												
Total fields	: 49												
Protected Fields	: 45												
Other Fields	: 4												
Number of records	: 379												

Field ID	Field Name	Type	Prot	Req	Spl	Hist	Cnft	Rep	Rst	Len	Dec	Min Value	Max Value
Due_Date	Due Date	Date	Y	N	N	Y	N	N	N	4	0		
Compleat_Dt	Date Completed	Date	Y	N	N	Y	N	N	N	4	0		
Calendar_Code	Calendar Code	Calendar Code	Y	N	N	N	N	N	N	8	0		
Location	Location	Memo	Y	N	N	N	N	N	N	128	0		
Desc	Description	Alpha	Y	N	N	Y	Y	N	N	128	0		
Comments	Comments	Memo	Y	N	Y	N	Y	N	N	45000	0		
Type	Type	Alpha	Y	N	N	N	N	N	N	1	0		
Start_Time	Time Start	Time	Y	N	N	Y	N	N	N	4	0		
End_Time	Time End	Time	Y	N	N	Y	N	N	N	4	0		
GroupInfo	User/Group	Memo	Y	N	N	N	N	N	N	1000	0		
Client_ID	Client ID	Client ID	Y	N	N	N	N	N	N	13	0		
Related_Party	Contact	Contact	Y	N	N	N	N	N	N	54	0		
User_ID	User ID	User	Y	N	N	Y	N	N	N	8	0		
Priority	Priority	Short	Y	N	N	Y	N	N	N	2	0	0	9
Private	Private	Boolean	Y	N	N	Y	N	N	N	1	0		
AlarmExpr	Alarm	Alpha	Y	N	N	Y	N	N	N	80	0		
Reminder1	Reminder 1	Date	Y	N	N	N	N	N	N	4	0		
Reminder2	Reminder 2	Date	Y	N	N	N	N	N	N	4	0		
Reminder3	Reminder 3	Date	Y	N	N	N	N	N	N	4	0		
Client_Name	Client Name	Virtual	Y	N	N	N	N	N	N	54	0		
Rule	Rule	Memo	Y	N	N	N	N	N	N	128	0		
LinkNo	Link Number	Long	Y	N	N	N	N	N	N	4	0		
IntegID	Integration ID	Memo	Y	N	N	N	N	N	N	199	0		
Pri_Key_Date_SeqNo	Pri Key Date SeqNo	Long	Y	N	N	N	N	N	N	4	0		
Sec_Key_Date_SeqNo	Sec Key Date SeqNo	Long	Y	N	N	N	N	N	N	4	0		
Root_SeqNo	Root SeqNo	Long	Y	N	N	N	N	N	N	4	0		
Orig_Template_SeqNo	Orig Template SeqNo	Long	Y	N	N	N	N	N	N	4	0		
Fee_SeqNo	Fee SeqNo	Long	Y	N	N	N	N	N	N	4	0		
Status	Status	Alpha	Y	N	N	N	N	N	N	1	0		
CLMisc	CLMisc	Memo	Y	N	N	N	N	N	N	128	0		
PlanVars	PlanVars	Memo	Y	N	N	N	N	N	N	45000	0		
CLActive	CLActive	Boolean	Y	N	N	N	N	N	N	1	0		
Client_Desc	Client Work Desc	Virtual	Y	N	N	N	N	N	N	50	0		
SnoozeDate	Snooze Date	Date	Y	N	N	N	N	N	N	4	0		
SnoozeTime	Snooze Time	Time	Y	N	N	N	N	N	N	4	0		
SnoozeVerification	Snooze Verification	Alpha	Y	N	N	N	N	N	N	110	0		
CR_System_ID	CR System Id	Long	Y	N	N	N	N	N	N	4	0		
CR_Jurisdiction_Id	CR Jurisdiction Id	Long	Y	N	N	N	N	N	N	4	0		
CR_Triggeritem_Id	CR Triggeritem Id	Long	Y	N	N	N	N	N	N	4	0		
CR_Misc	CR Misc	Memo	Y	N	N	N	N	N	N	45000	0		
Doc1	Document1	File	N	N	N	Y	+	N	N	260	0		
Doc2	Document2	File	N	N	N	Y	+	N	N	260	0		
Contact_Phone	Contact Phone	Virtual	N	N	N	N	N	N	N	31	0		
Contact_Email	Contact Email	Virtual	N	N	N	N	N	N	N	100	0		
End_Date	End Date	Date	Y	N	N	N	N	N	N	4	0		
Due_Date_Local	Due Date Local	Virtual	Y	N	N	N	N	N	N	4	0		
Start_Time_Local	Start Time Local	Virtual	Y	N	N	N	N	N	N	4	0		
End_Date_Local	End Date Local	Virtual	Y	N	N	N	N	N	N	4	0		
End_Time_Local	End Time Local	Virtual	Y	N	N	N	N	N	N	4	0		

Index	Index ID	Index Description	Protected	Sort Order
1	Client (Due Date)	Client/Due Date/Start Time	Y	<Client_ID><Due_Date><Start_Time><Entry Order>
2	Due Date	All Records by Due Date/Start Time	Y	<Due_Date><Start_Time><Entry Order>
3	Client (Entry Order)	For Document Assembly	Y	<Client_ID><Entry Order>
4	Events Only	Events Only - User/Due Date	Y	<User_ID><Due_Date><Start_Time><Entry Order>
5	Tasks Only	Tasks Only - User/Completion Date	Y	<User_ID><Compleat_Dt><Due_Date><Priority><Entry Order>
6	Root Seq No	For Internal Use	Y	<Root_SeqNo><Entry Order>
7	Key Date Seq No	For Internal Use	Y	<Pri_Key_Date_SeqNo><Entry Order>
8	Link Number	For Internal Use	Y	<LinkNo><Entry Order>
9	Reminder 1	For Internal Use	Y	<Type><User_ID><Reminder1><Start_Time><Entry Order>
10	Reminder 2	For Internal Use	Y	<Type><User_ID><Reminder2><Start_Time><Entry Order>
11	Reminder 3	For Internal Use	Y	<Type><User_ID><Reminder3><Start_Time><Entry Order>
12	Alarm Index	For Internal Use	Y	<User_ID><SnoozeDate><SnoozeTime><Entry Order>
13	CompuLaw Plans	For Internal Use	Y	<Root_SeqNo><Due_Date><Entry Order>
14	Calendar Rules Event	For Internal Use	Y	<CR_System_Id><Entry Order>
15	Calendar Rules Plan	For Internal Use	Y	<CR_Jurisdiction_Id><CR_Triggeritem_Id><Entry Order>

Menu

Reports | File Definition Report

The File Definition Report provides information on the current configuration for a PracticeMaster data file. This allows you to view information that is normally only accessible from File Maintenance, without requiring other users to exit the software.

Definitions

AOP Name Indicates the file's Area of Practice. If the file is not associated with an Area of Practice, then CMSYSTEM is shown.

AOP Description	The description assigned to the file's Area of Practice. If the file is not associated with an Area of Practice, then System Files is shown.
File Name	The file's name.
File Description	The description assigned to the file.
File Type	Either Fixed or Variable. Files with one or more Memo fields are considered to be a Variable File Type.
Fixed Record Size	The actual size of the fixed portion of each record in the file excluding Memo fields.
Number of Indexes	The number of indexes associated with the file.
Total fields	The number of fields that have been defined for the data file.
Protected Fields	The number of protected fields that have been defined for the data file.
Other Fields	The number of non-protected fields that have been defined for the data file.
Number of Records	Indicates the number of records present in the file at the time the report was printed.
Field ID	The Field ID is the field's short name.
Field Name	The Field Name is the field's long name and allows spaces and other special characters.
Field Type	The Field Type determines the type of information that can be entered for the field.
Prot	Indicates whether the field is protected (i.e., cannot be edited by the user).
Req	Indicates whether the field is required (i.e., the field must be populated when editing a record).
Spl	Indicates whether the field should be automatically spell checked when a new record is added.
Hist	Indicates whether history tracking has been enabled for the field.
Cnflt	Indicates whether the contents of the field should be included in conflict of interest or document searches. An asterisk (*) is displayed next to this column when the Include in Contact Search check box is selected. A plus sign "+" to the left of this column indicates the field will be printed on the conflict report and contact report.
Rep	Indicates whether the contents of the field will be copied to a new record when the Replicate function is used.
Rst	Indicates whether the field is restricted.
Len	Indicates the Field Length
Dec	Indicates the number of decimal places for number fields.
Min Value	Indicates the optional minimum value for number fields.
Max Value	Indicates the optional maximum value for number type fields.
Index	Indicates the order in which indexes were added to the file.
Index ID	Indicates the index's short name.
Index Description	The Index Description is the field's long name and allows spaces and other special characters.
	Note: If this field is blank, the index is a temporary index. Any temporary indexes created by the user during the session will be included on the File Definition Report if the file is open at the time the report is run.
Protected	Indicates whether the index is protected (i.e., cannot be edited by the user). A value of "Y" indicates the field is protected. A value of "N" indicates the field is not protected.
Sort Order	Displays the sort order defined for each index.

Client Inactivity Report

Date: 08/23/2022		PracticeMaster Client Inactivity Report Jensen, Martin & Anderson, P.C.				Page: 1
Primary Timekeeper 1: Michael L. Jensen						
No Activity From: 05/25/2022 Thru 08/23/2022						
Client	Name	AOP	Last Date	Activity	User ID	
121.01	Phillips/Marcus Real Estate Acquisition	REALEST	05/25/2022	Phone	JEN	
Primary Timekeeper 2: Paula Ann Martin						
No Activity From: 05/25/2022 Thru 08/23/2022						
Client	Name	AOP	Last Date	Activity	User ID	
102.00	Gilbert/Andrew C. Auto Accident	PI	04/27/2022	Document	PAM	
Primary Timekeeper 3: Ronald P. Anderson						
No Activity From: 05/25/2022 Thru 08/23/2022						
Client	Name	AOP	Last Date	Activity	User ID	
300.00	McBride/John Management of Estate Trust	WILLS	05/21/2022	Client Opened	RON	
Number of Clients printed: 3						
Number of Clients analyzed: 14						

Menu [Reports | Client Inactivity Report](#)

The Client Inactivity Report above can be used to easily identify clients and cases with no activity in a specified time frame. This report helps you determine which cases need follow up and makes it easy to identify cases that should be marked inactive. The period of inactivity can be defined as the last number of days, weeks, months, or years. The ability to load and save report definitions, as well as designate a default report definition are available in the Client Inactivity Report. When the report is displayed using the Preview option, you can mouse over individual records and with a click of the mouse immediately drill down to the record containing the last activity for the client.

Definitions

- Client** Client ID.
- Name** Client name. Listed under the Name is the Work Description of the client.
- AOP** Area of Practice of the client. If the client is not assigned to an Area of Practice, no value will be shown.
- Last Date** The date of last activity for the client, based on the date in the associated record.
 - Calendar File** The Date Completed field is used. If the Date Completed is mm/dd/yyyy, the Due Date field will be used instead.
 - Journal File** In Note, Email, Phone, Timer, and Research records, the Date field is used.
 - Document Management File** The Date field is used.
 - Fee File** The Date field is used.
 - Cost File** The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.
 - Common Client Related Files** The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.
 - Area of Practice Files** The Last Modified date that is stored in the record header is used. This information cannot be viewed in the software.
- Activity** The type of record that contains the last activity for the client.
- User ID** Name of the user who entered the last activity for the client.
- (Pri)** Primary timekeeper assigned to the client. This column is included when a Report Order other than Primary Timekeeper is selected.

Note: When including Fee and Cost files, both Work-In-Process and Archived transactions present will be searched.

Activity Note: The Date Opened and Date Closed fields in the Client file are considered activity. Therefore, if the value of the client's Date Opened or Date Closed field falls within the time frame specified, the client will not be included on the report.

List of Client's Birthdays

Date: 08/23/2022		List of Client's Birthdays	Page: 1
		Jensen, Martin & Anderson, P.C.	
January	thru	December	
Birthday	Client Name		Age
01/03/1975	Klein/Daniel P.		47
05/25/1980	Larson/Michael		42
10/20/1977	Gilbert/Andrew C.		45
10/26/1977	White/Kelly		40
10/26/1977	White/Kelly		40
10/26/1977	White/Kelly		40
11/04/1968	Williams/John		53
Number of Birthdays = 7			

Report Writer Name **BIRTHDY**

The List of Client's Birthdays is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a specified range of Client Names and months. Clients are sorted by birthday month. A count of birthdays is displayed for the entire report.

Client Referral Report

Date: 08/23/2022		Client Referral Report	Page: 1
		Jensen, Martin & Anderson, P.C.	
Client Range:	to		
Area of Practice Range:		ADMIN to WILLS	
Referral Range:	to	ZZZ	
Date Opened Range:		03/01/2022 to 08/25/2022	
REALEST - Real Estate Law			
Client ID	Client Name	Date Opened	Referred By
121.01	Phillips/Marcus	03/26/2022	Knigh/Elizabeth M.
WC - Workers' Compensation			
Client ID	Client Name	Date Opened	Referred By
100.00	Larson/Michael	06/24/2022	Roberts/Linda M.

Report Writer Name **REFERRAL**

The Client Referral Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes referred clients sorted by Area of Practice and are displayed in Client ID order. This report can be generated for a specified range of Client IDs, Areas of Practice, referral names, and open dates. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Litigation Analysis

Date: 08/23/2022		Litigation Analysis				Page: 1	
Client Range: to							
Area of Practice Range: to ZZZ							
Date Closed Range: 01/01/2022 to 07/15/2022							
BUSLAW - Business Law							
Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation	
105.00	Richardson/Harold	Manage Personal Finances	11/14/21	06/28/22	227	7.5	
Area of Practice Average					227	7.5	
PI - Personal Injury Law							
Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation	
400.00	Jefferson Insurance Co.	Haynes v. Jefferson Insurance Co.	02/18/21	07/10/22	508	16.7	
Area of Practice Average					508	16.7	
WILLS - Wills and Trusts Law							
Client ID	Client Name	Description	Date Opened	Date Closed	Days In Litigation	Months In Litigation	
300.00	McBride/John	Management of Estate Trust	12/11/21	07/13/22	215	7.1	
Area of Practice Average					215	7.1	
Average Litigation					317	10.4	

Report Writer Name **ANALYSIS**

The Litigation Analysis report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes Client IDs sorted by Area of Practice and are displayed in Client ID order. This report can be generated for a specified range of Client IDs, Areas of Practice, and close dates. Drill-down editing capabilities allow you to edit records directly from the Preview window

Blank Client ID Calendar Records

Date: 08/23/2022		Blank Client ID Calendar Records				Page: 1	
Jensen, Martin & Anderson, P.C.							
<u>07/25/2022 Monday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
08:30 AM	09:30 AM	RON	E		Meeting with Partners		
<u>08/09/2022 Tuesday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
08:45 AM	11:30 AM	CLB	E		Firm Meeting	Conference Room	
<u>08/12/2022 Friday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
02:30 PM	04:30 PM	RON	E		Meeting with Harold Berk in Conference Room.		
<u>08/15/2022 Monday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
08:00 AM	10:00 AM	JIM	E		Meeting with Mike Johnson		
03:00 PM	04:30 PM	MLJ	E		Appointment with Jim Tucker.		
03:30 PM	05:00 PM	JAN	E		Outside conference with Julie Thomas.		
<u>08/19/2022 Thursday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
08:30 AM	09:00 AM	MLJ	E		Initial Client Meeting		
09:00 AM	10:00 AM	JAN	E		Meeting with potential client		
09:15 AM	11:15 AM	RON	E		Meeting with Harold Berk in Conference Room.		
01:45 PM	03:15 PM	ROB	E		Partner Meeting		
<u>08/19/2022 Friday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
02:15 PM	04:00 PM	DAN	E		Appointment with Robert Maxwell.		
<u>08/22/2022 Monday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
09:30 AM	09:45 AM	MLJ	E		Appointment with Harry Jones.		
10:00 AM	11:00 AM	JAN	E		Meeting with Ben Howard	North Conference Room	
10:15 AM	11:30 AM	MLJ	E		Meeting with Robert Maxwell.	Room 4	
12:15 PM	01:00 PM	JAN	E		Meeting with Shelly McGuire		
<u>08/23/2022 Tuesday</u>							
Start Time	Stop Time	User	Type	Completed	Description	Location	
09:30 AM	11:00 AM	KIM	E		Meeting with Roger Nelson		

Report Writer Name BLANKID

The Blank Client ID Calendar Records report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records without an assigned Client ID. This report can be generated for a specified range of due dates.

Client Calendar

Date: 08/23/2022		Client Calendar		Page: 1
		Jensen, Martin & Anderson, P.C.		
Client Range:	200.02 to 200.02	Calendar Type(s):	E,T	
Due Date Range:	08/01/2022 to 08/31/2022	Incomplete Entries Only:	No	
User Range:	to ZZZ			
200.02 Peterson Insurance Co.		Area of Practice:	ADMIN	
Maintenance of Insurance Policies		Primary Timekeeper:	RP	
08/12/2022	Friday RON	Preparation of proposal for Mid-State Insurance Company.	Completed: 08/20/2022	
01:00 PM	JEN	Office conference with Richard Jackson. Room 23		
08/16/2022	Tuesday 11:30 AM CHERYL	Meeting with Paul. South Conference Room		
11:30 AM	DANIEL	Meeting with Paul. South Conference Room		
01:15 PM	JEN	Appointment with Paul Franklin.		
08/19/2022	Friday 09:00 AM DANIEL	Deposition of Tom Smith.		
11:15 AM	RON	Outside conference with Jack Evans. The Meeting Place		
01:00 PM	JEN	Office conference with Richard Jackson.		
08/22/2022	Monday 08:00 AM CHERYL	Meeting with Health USA. Michael's Office		
08:00 AM	MLJ	Meeting with Health USA. Michael's Office		
11:00 AM	JASON	Filing Deadline	Incomplete Task	
01:15 PM	JEN	Appointment with Paul Franklin. The Mill		
02:00 PM	CHERYL	Consultation with Paul regarding insurance policies.		
08/24/2022	Wednesday 12:45 PM JEN	Outside conference with Mary Harris. The Meeting Place	Future Event	

Report Writer Name CLNTCAL

The Client Calendar report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by Client ID. This report can be generated for a specified range of Client IDs, due dates, and user IDs. You can specify which calendar Types to include on the report (i.e., E-event, T-task). This report can also be generated for "incomplete entries only." For purposes of this report, an incomplete entry is defined as a task calendar record without a date in the **Date Completed** field or an event with a **Due Date** within the specified date range.

Calendar by Due Date

Date: 08/23/2022		Calendar by Due Date				Page: 1
Case Range:	200.02 to					Calendar Type(s): E,T
Due Date Range:	08/08/2022 to 08/19/2022					Incomplete Entries Only: No
User Range:	to ZZZ					
<u>08/09/2022 Tuesday</u>						
Time	User	Type	Completed	Description		
01:00 PM	JEN	E		Office conference with Richard Jackson. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies		
<u>08/11/2022 Thursday</u>						
Time	User	Type	Completed	Description		
hh:mm AM	RON	T	08/15/2022	Preparation of proposal for Mid-State Insurance Company. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies		
01:15 PM	JEN	E		Appointment with Paul Franklin. Location: Omaha Office Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies		
<u>08/12/2022 Friday</u>						
Time	User	Type	Completed	Description		
11:30 AM	CHERYL	E		Meeting with Paul. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies		
11:30 AM	RON	E		Meeting with Paul. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies		
<u>08/15/2022 Monday</u>						
Time	User	Type	Completed	Description		
11:00 AM	RON	T		Filing Deadline Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies		

Report Writer Name **CALDUE**

The Calendar by Due Date report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by due date. You can specify a range of Client IDs, due dates, and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task). This report can also be generated for "incomplete entries only." For purposes of this report, an incomplete entry is defined as a task calendar record without a date in the Date Completed field or an event with a Due Date within the specified date range. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Calendar by User

Date: 08/23/2022		Calendar by User		Page: 1	
Jensen, Martin & Anderson, P.C.				Calendar Type(s): E,T	
Case Range:	to				
User Range:	to	ZZZ			
Date Range:	08/01/2022	to	08/31/2022		
User: Cathleen Trudore					
Tuesday	08/02/2022	02:00 PM	Type: E	Consultation with Paul regarding insurance policies. Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	
Wednesday	08/03/2022	11:30 AM	Type: E	Outside conference with John Williams at the Hilton. Client ID: 101.00 Williams/John AOP: CRIMLAW State v. Williams	
Thursday	08/04/2022	01:15 PM	Type: E	Appointment with Paul Franklin. Location: The Mill Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	
Tuesday	08/09/2022	08:00 AM	Type: E	Meeting with Health USA. Location: Michael's Office Client ID: 200.02 Peterson Insurance Co. AOP: ADMIN Maintenance of Insurance Policies	

Report Writer Name **CALUSER**

The Calendar by User report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes calendar records sorted by user. You can specify a range of Client IDs, due dates, and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task). Drill-down editing capabilities allow you to edit records directly from the Preview window.

Daily Report

Date: 08/23/2022		Daily Report		Page: 1	
Jensen, Martin & Anderson, P.C.					
Report Date Range: 08/15/2022 thru 08/31/2022					
User ID: RON					
Client ID	Due Date	Day	Start Time	End Time	Description
200.01	08/16/2022	Tue	09:00 AM	03:00 PM	Hearing
102.00	08/18/2022	Thu	03:30 PM	05:00 PM	Office conference with John Kessler.
200.01	08/19/2022	Fri	08:00 AM	09:00 AM	Outside conference with Paul Franklin.
	08/19/2022	Fri	02:30 PM	04:30 PM	Meeting with Harold Berk in Conference Room.
102.00	08/23/2022	Tue	08:00 AM	10:15 AM	Outside conference with John Kessler.
102.00	08/23/2022	Tue	01:45 PM	03:00 PM	Office conference with Samantha Kessler.
	08/24/2022	Wed	09:15 AM	11:15 AM	Meeting with Harold Berk in Conference Room.
200.02	08/25/2022	Thu	11:15 AM	12:15 PM	Outside conference with Jack Evans.
101.00	08/26/2022	Fri	08:00 AM	09:00 AM	Outside conference with John Williams.
102.00	08/26/2022	Fri	09:00 AM	11:00 AM	Deposition of Bryan Jones.
	08/29/2022	Mon	08:00 AM	05:00 PM	Continuing Legal Education - Litigation
	08/29/2022	Mon	12:00 PM	01:00 PM	Luncheon with Steve.
Client ID	Due Date	Day	Description	Tasks	
121.01	08/26/2022	Fri	Review Escrow Documents.		

Date: 08/23/2022		Daily Report		Page: 1	
Jensen, Martin & Anderson, P.C.					
Report Date Range: 08/15/2022 thru 08/30/2022					
User ID: RON					
08/16/2022 Tue					
Client ID	Start Time	End Time	Description		
200.01	09:00 AM	03:00 PM	Hearing Peterson Insurance Co. General Legal Counsel		
08/18/2022 Thu					
Client ID	Start Time	End Time	Description		
102.00	03:30 PM	05:00 PM	Office conference with John Kessler. Gilbert/Andrew C. Auto Accident		
08/19/2022 Fri					
Client ID	Start Time	End Time	Description		
200.01	08:00 AM	09:00 AM	Outside conference with Paul Franklin. Peterson Insurance Co. General Legal Counsel		
	02:30 PM	04:30 PM	Meeting with Harold Berk in Conference Room.		
08/22/2022 Mon					
Client ID	Description	Tasks			
121.01	Review Escrow Documents. Phillips/Marcus Real Estate Acquisition				
08/23/2022 Tue					
Client ID	Start Time	End Time	Description		
102.00	08:00 AM	10:15 AM	Outside conference with John Kessler. Gilbert/Andrew C. Auto Accident		
08/24/2022 Wed					
Client ID	Start Time	End Time	Description		
	09:15 AM	11:15 AM	Meeting with Harold Berk in Conference Room.		

Menu **Reports | Daily Report**

The Daily Report is a calendar report that can optionally include tasks, events, and reminders. You can specify a date range and specify which users to include. You can optionally include Calendar Comments, Client Name, and the Client Work Description with each Description. Activities can be categorized by 1) Type, then by Date; or 2) by Date, then by Type. You can optionally include overdue tasks and tasks with no Due Date. Completed tasks are not included on this report (i.e., tasks with a date in the Completed Date field). Reports for each specified user will start on a new page. If categorizing activities by Date, then by Type, you can optionally start each date on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window. This report cannot be modified.

The report on the left is sorted by Type, then by Date. The report on the right is sorted by Date, then by Type, and also includes the client name and work description.

To Do List

Date: 08/23/2022		To Do List		Page: 1
		Jensen, Martin & Anderson, P.C.		
Client Range:	to			Calendar Type(s): E,T
Due Date Range:	08/21/2022	to	08/27/2022	
User Range:	to			
Events				
Date	Time	User	Description	
08/22/2022	08:30 AM	MLJ	Initial Client Meeting	
	09:15 AM	RO	Meeting with Harold Berk in Conference Room.	
	11:15 AM	JAN	Consultation with Samantha regarding insurance policy. [102.00 Gilbert/Andrew C.]	
08/26/2022	01:45 PM	RO	Partner Meeting	
	09:30 AM	MLJ	Appointment with Harry Jones.	
	09:45 AM	JIM	Office conference with Mark, RE: file. [121.01 Phillips/Marcus] North Conference Room	
	12:15 PM	JAN	Meeting with Shelly McGuire	
	01:00 PM	JAN	Appointment with Marcus Phillips. [121.01 Phillips/Marcus] North Conference Room	
	03:30 PM	JAN	Mediation [200.01 Peterson Insurance Co.]	
Tasks				
Date	Time	User	Description	
08/23/2022		RO	Send referral payment to Mr. Williams. [100.00 Larson/Michael]	
08/24/2022		CL	Verify receipt of medical records request. [120.01 Klein/Daniel P.]	
08/26/2022		KIM	Evaluations to Court in 5 days. [850.00 White/Kelly]	

Report Writer Name **TODO_LST**

The To Do List is a Report Writer report included in PracticeMaster that can be modified as desired. This report includes calendar records sorted by type and by date. You can specify a range of Client IDs, reminder/due dates, and user IDs as well as which calendar types to include on the report (i.e., E-event, T-task).

Calendar Plan Template Report

Date: 08/23/2022		Calendar Plan Template Report Jensen, Martin & Anderson, P.C.						Page: 1	
Template Name:	Trial Setting								
Description:									
Area of Practice:	CMSYSTEM								
Venue:	Standard Holidays								
Item	Parent Item	User ID	Type	Interval	Unit	Mail Interval	Mail Unit	Adj	Included Template
Trial Setting			T						
Trial Date	Trial Setting		T	0	D	0	D	Prev BD	None
Secondary Exchange Expert Witness List	Trial Date		T	-70	D	0	D	Prev BD	None
Last court day before Trial for settlement offer	Trial Date		T	-15	D	0	D	Prev BD	None
Request for Jury instructions	Trial Date		T	-1	BD	0	D	Prev BD	None
Last court day for settlement offer -mail	Trial Date		T	0	D	-15	MD	Prev BD	None
Last court day for settlement offer -hand delivery	Trial Date		T	-12	D	0	D	Prev BD	None
Arrange for copy with court reporter (Last Day)	Trial Date		T	-2	W	0	D	Prev BD	None
Must file election to arbitrate by today.	Trial Date		T	-90	D	0	D	Prev BD	None
Exchange Expert Witness List	Trial Setting	DANIEL	T	10	D	0	D	Prev BD	None

Menu [Calendar](#) | [Calendar Plan Templates](#) | [Print Template](#)

The Calendar Plan Template Report is accessed via the Calendar Plan Templates program by clicking the Print Template button when a Calendar Plan Template is highlighted. This report includes the Calendar Plan Template information. This report cannot be modified.

Definitions for Calendar Plan Template Report

- Date (heading)** Used for reference only.
- Template Name** The name assigned to the template being printed.
- Description** The value from the template’s **Description** field.
- Area of Practice** The area of practice in which the template was created.
- Venue** The venue assigned to the template.
- Item** The name of the item in the template.
- Parent Item** The name of the item on which this item is dependent.
- User ID** The user ID associated with the item.
- Type** The type of each calendar record. E (event) or T (task).
- Interval** The number of intervals after the parent item this item should be assigned.
- Unit** Interval units: “D”=Days, “BD”=Business Days (Monday through Friday, not including holidays), “W”=Weeks, “M”=Months, “Y”=Years,
- Mail Interval** The number of intervals after the parent item this item should be mailed.
- Mail Unit** Interval units: “D”=Days, “MD”=Mail Days (Monday through Saturday, not including holidays), “W”=Weeks, “M”=Months, “Y”=Years.
- Adj** Any adjustment that should be made to ensure the item falls on the previous business day, the next business day, or a specific day of the week.
- Included Template** If a separate template is included on the item, displays the name of the template.

Calendar Plan Report

Date: 08/23/2022		Calendar Plan Report Jensen, Martin & Anderson, P.C.				Page: 1	
Template Name: Larson Worker's Comp							
Client ID: 100.00 Larson/Michael Larson v. Bel-Cor							
Date	Description/Comments	Type	Start Time	End Time	User ID	Client ID	Contact
06/29/2022	Open Workers' Comp Case	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/02/2022	Claim filed with W/C Court?	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/06/2022	Fee Agreement signed & sent to W/C Court?	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/09/2022	Gather/update medical records.	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/12/2022	Letter to client re: procedures & releases.	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/12/2022	Fee Agreement approved by W/C Court?	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/13/2022	Has employer been notified?	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael
07/29/2022	Claims Adjuster appointed & contacted?	T	hh:mm AM	hh:mm AM	JENSEN	100.00	Larson/Michael

Menu

[Calendar](#) | [View Calendar Plans](#) | [Print Plan](#)

The Calendar Plan Report is accessed via the View Calendar Plans program by clicking the **Print Plan** button when a Calendar Plan is highlighted. This report includes a list of calendar records generated from a specific Calendar Plan. This report cannot be modified.

Definitions for Calendar Plan Report

- Date (heading)** Used for reference only.
- Template Name** The name assigned to the template being printed.
- Client ID** Client ID, name and work description.
- Date** The date assigned to the calendar record.
- Description/Comments** The value from the calendar record's **Description** field if the calendar plan was generated via PracticeMaster or the **Comments** field if the calendar plan was generated by CalendarRules.
- Type** The type of each calendar record. E (event) or T (task).
- Start Time** The start time assigned to the calendar record.
- End Time** The end time assigned to the calendar record.
- User ID** The user ID assigned to the calendar record.
- Client ID** The client ID assigned to the calendar record.
- Contact** The contact assigned to the calendar record.

Graphical Calendar Report

Menu

[Reports | Graphical Calendar Report](#)

The Graphical Calendar Report displays calendar records in various report styles. You can optionally include the Task List when printing the Graphical Calendar Report. You can change the appearance of the report (i.e., font, font size, etc.) as well as specify the user IDs and dates to be included.

Note: The actual fields displayed on the Graphical Calendar Report are determined by the options specified in the **Display Fields** section of the **General** tab of the **Calendar Properties** window. When tasks are included, the width of the task columns can be modified by dragging the column dividers in the Task List at the bottom of the Daily/Weekly/Monthly Calendar window or in the Task List program. Column sizes are stored separately for each user.

The Monthly Report Style on the following page includes the optional Task List.

Daily Report Style

August 22, 2022		August 2022	September 2022
Monday		S M T W T F S	S M T W T F S
ALL		1 2 3 4 5 6	1 2 3
All Day		7 8 9 10 11 12 13	4 5 6 7 8 9 10
8 am		14 15 16 17 18 19 20	11 12 13 14 15 16 17
		21 22 23 24 25 26 27	18 19 20 21 22 23 24
		28 29 30 31	25 26 27 28 29 30
<p>RPAM - ROB - RON - 9:00am - Hearing - Gilbert/Andrew C. - Courthouse</p> <p>KIM - Evaluations to Court in 5 days. - White/Kelly</p> <p>JIM - 11:00am - Filing Deadline - Peterson Insurance Co.</p>			
<p>CLB - MLJ - 8:00am - Meeting with Health USA. - Peterson Insurance Co. - Michael's Office</p>			
9:00			
<p>MLJ - 9:30am - Appointment with Harry Jones.</p>			

Weekly Report Style

August 15, 2022 - August 21, 2022		August 2022	September 2022
ALL		S M T W T F S	S M T W T F S
Monday, August 15, 2022		1 2 3 4 5 6	1 2 3
<p>RRON - 8:00am - Continuing Legal Education - Litigation - The Cornhusker Hotel, Suite 300</p> <p>RJEN - 3:30pm - Mediation - Peterson Insurance Co.</p> <p>JIM - 8:00am - Meeting with Mike Johnson</p> <p>MLJ - 3:00pm - Appointment with Jim Tucker.</p> <p>JEN - 3:30pm - Outside conference with Julie Thomas.</p>		7 8 9 10 11 12 13	4 5 6 7 8 9 10
		14 15 16 17 18 19 20	11 12 13 14 15 16 17
		21 22 23 24 25 26 27	18 19 20 21 22 23 24
		28 29 30 31	25 26 27 28 29 30
Thursday, August 18			
<p>MLJ - 8:30am - Initial Client Meeting</p> <p>JEN - 9:00am - Meeting with potential client</p> <p>RON - 9:15am - Meeting with Harold Berk in Conference Room.</p> <p>JEN - 11:15am - Consultation with Samantha regarding insurance policy. - Gilbert/Andrew C.</p> <p>ROB - 1:45pm - Partner Meeting</p>			
Tuesday, August 16			
<p>RMLJ - 9:30am - Appointment with Harry Jones.</p> <p>RRON - 8:00am - Outside conference with John Kessler. - Gilbert/Andrew C. - 34th & Center</p> <p>CLB - DAN - 11:30am - Meeting with Paul. - Peterson Insurance Co. - South Conference Room</p> <p>JEN - 1:15pm - Appointment with Paul Franklin. - Peterson Insurance Co.</p> <p>JIM - RON - 1:45pm - Office conference with Samantha Kessler. - Gilbert/Andrew C. - Room 4</p>			
Friday, August 19			
<p>RRON - 8:00am - Continuing Legal Education - Litigation - The Cornhusker Hotel, Suite 300</p> <p>RRON - 9:00am - Deposition of Bryan Jones. - Gilbert/Andrew C. - Courtroom 23</p> <p>RPAM - ROB - RON - 9:00am - Hearing - Klein/Daniel P. - Courthouse</p> <p>RMLJ - 10:15am - Meeting with Robert Maxwell. - Room 4</p> <p>RJEN - 3:30pm - Mediation - Peterson Insurance Co.</p> <p>ROB - Send referral payment to Mr. Williams. - Larson/Michael</p>			
Wednesday, August 17			
<p>RDAN - 9:00am - Deposition of Tom Smith. - Peterson Insurance Co.</p> <p>DAN - 10:45am - Outside conference with Marc Phillips. - Phillips/Marcus - The Coffee House</p>			
Saturday, August 20			
Sunday, August 21			

Weekly Report Style
(with the Daily Style check box selected)

August 2022						September 2022					
August 15, 2022 - August 19, 2022											
ALL	Mon, Aug 15, 22	Tue, Aug 16	Wed, Aug 17	Thu, Aug 18	Fri, Aug 19						
All Day	R RON - 8:00am - More	R MLJ - 9:30am -	R DAN - 9:00am -		R RON - 8:00am - More						
8 am	JIM - 8:00am - Meeting with Mike Johnson	RON - 8:00am - Outside conference with John Kessler. - Gilbert/Andrew C. - 34th & Center		MLJ - 8:30am - Initial Client Meeting							
9:00				JEN - 9:00am - Meeting with potential	DAN - 9:00am - Deposition of Tom Smith. - Peterson Insurance Co.						
10:00				RON - 9:15am - Meeting with Harold Berk in Conference Room.	MLJ - 9:15am - Attend meeting with Jim Peterson. - Peterson Insurance Co.						
11:00			DAN - 10:45am - Outside conference with Marc Phillips. - Phillips/Marcus - The Coffee House	JEN - 11:15am - Consultation with Samantha regarding insurance policy. -	RON - 11:15am - Outside conferen						
12 pm		CLB - DAN - 11:30am - Meeting with Paul. - Peterson Insurance Co. - South Conference Room									

Monthly Report Style

August 2022							September 2022						
ALL	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday						
		Aug 1	2	3	4	5	6						
	7	8	R RON - 9:00am - Deposition of R JIM - RON - 9:00am - Hearing -	R JIM - RON - 9:00am - Hearing -	11	R DAN - 9:00am - Deposition of R MLJ - PAM - 3:30pm - Hearing -	13						
	14	R JEN - 3:30pm - Mediation - Peterson R MLJ - PAM - 3:30pm - Hearing -	R RON - 9:00am - Deposition of CLB - 8:45am - Firm Meeting - Conference	DAN - 11:00am - Office conference with	R RON - 3:30pm - Office	R RON - 8:00am - Outside conference with KIM - 11:00am - Meeting with Kelly to discuss	20						
	21	R RON - 8:00am - Continuing R JEN - 3:30pm - Mediation - Peterson	R MLJ - 9:30am - Appointment RON - 8:00am - Outside	R DAN - 9:00am - Deposition of DAN - 10:45am - Outside conference with	MLJ - 8:30am - Initial Client Meeting JEN - 9:00am - Meeting with potential client	R RON - 8:00am - Continuing RON - 9:00am - Deposition of	27						
	28	R PAM - ROB - RON - 9:00am - KIM - Evaluations to Court in 5 days	R RON - 8:00am - Continuing MLJ - 11:00am - Filing Deadline - Gilbert/Andrew	R KIM - MLJ - ROB - 9:00am - Hearing - RON - 8:00am - Continuing									

Agenda Report Style

August 22, 2022 - August 26, 2022		August 2022	September 2022										
S	M	T	W	T	F	S	S	M	T	W	T	F	S
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29	30	

Monday, August 22, 2022	
R PAM - ROB - RON - 9:00am - Hearing - Gilbert/Andrew C. - Courthouse	
KIM - Evaluations to Court in 5 days. - White/Kelly	
JIM - 11:00am - Filing Deadline - Peterson Insurance Co.	
🔔 CLB - MLJ - 8:00am - Meeting with Health USA. - Peterson Insurance Co. - Michael's Office	
MLJ - 9:30am - Appointment with Harry Jones.	
🔔 JIM - 9:45am - Office conference with Mark, RE: file. - Phillips/Marcus - North Conference Room	
🔔 JEN - 10:00am - Meeting with Ben Howard - North Conference Room	
MLJ - 10:15am - Meeting with Robert Maxwell. - Room 4	
🔔 JEN - 12:15pm - Meeting with Shelly McGuire	
🔔 JEN - 1:00pm - Appointment with Marcus Phillips. - Phillips/Marcus - North Conference Room	
CLB - 2:00pm - Consultation with Paul regarding insurance policies. - Peterson Insurance Co.	
🔔 JEN - 3:30pm - Mediation - Peterson Insurance Co.	

Tuesday, August 23	
R RON - 8:00am - Continuing Legal Education - Litigation - The Cornhusker Hotel, Suite 300	
MLJ - 11:00am - Filing Deadline - Gilbert/Andrew C.	
🔔 RON - 8:00am - Outside conference with John Williams. - Williams/John - South Conference Room	
🔔 RON - 9:00am - Deposition of Bryan Jones. - Gilbert/Andrew C. - Courtroom 23	
🔔 KIM - 9:30am - Meeting with Roger Nelson	
🔔 MLJ - 11:00am - Appointment with Jim Peterson - Peterson Insurance Co.	
🔔 JEN - 1:15pm - Appointment with Paul Franklin. - Peterson Insurance Co. - The Mill	

Wednesday, August 24	
R KIM - MLJ - ROB - 9:00am - Hearing - White/Kelly - Courthouse	
🔔 RON - 8:00am - Continuing Legal Education - Litigation - The Cornhusker Hotel, Suite 300	
🔔 CLB - 9:00am - Firm Meeting - Conference Room	
🔔 JEN - 12:45pm - Outside conference with Mary Harris. - Peterson Insurance Co. - The Meeting Place	

Graphical Task List Report

Menu [Reports | Graphical Task List Report](#)

The Graphical Task List Report displays task calendar records. You can change the appearance (i.e., font, font size, etc.) of the report as well as specify the user IDs and dates to be included. The Calendar Properties program determines the order in which the columns print and the criteria for which tasks are included. The width of the columns can be modified by dragging the column dividers in the Task List at the bottom of the Daily/Weekly/Monthly Calendar window or in the Task List program. Column sizes are stored separately for each user.

Task List

Task List						
X	Due_Date	Desc	GroupInfo	User_ID	Start_Time	End_Time
	07/31/2022	Filing Deadline	JASON	JASON	11:00:00 AM	hh:mm:ss AM
	07/31/2022	Confirmation of Service.	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM
	08/24/2022	Verify receipt of employment records by	JEN	JEN	hh:mm:ss AM	hh:mm:ss AM
	08/24/2022	Confirm date of evaluation(s) have been s	KENDRA	KENDRA	hh:mm:ss AM	hh:mm:ss AM
	08/24/2022	Evaluations to Court in 5 days.	KENDRA	KENDRA	hh:mm:ss AM	hh:mm:ss AM
	08/25/2022	Filing Deadline	MLJ	MLJ	11:00:00 AM	hh:mm:ss AM
	08/24/2022	Send referral payment to Mr. Williams.	ROBERT	ROBERT	hh:mm:ss AM	hh:mm:ss AM
	08/24/2022	Review Escrow Documents.	RON	RON	hh:mm:ss AM	hh:mm:ss AM

Client Time Summary

Date: 08/23/2022		Client Time Summary		Page: 1
Jensen, Martin & Anderson, P.C.				
Client Range:	102.00 to	102.00		
Date Range:	04/01/2022	to	08/23/2022	
Timekeeper Range:	1 to	999		
Client ID:	102.00	Gilbert/Andrew C. Auto Accident Personal Injury Law		
Date	Tmkr	Hours	Amount	Description
04/17/2022	MLJ	1.00	250.00	Initial Client Meeting
04/24/2022	MLJ	1.00	250.00	Manage data/files.
04/27/2022	RPA	0.20	32.00	Filed preliminary claim with court.
05/17/2022	MLJ	1.00	250.00	Review/analyze possible strategies.
05/24/2022	RPA	0.20	32.00	Claims Adjuster appointed & contacted?
06/24/2022	MLJ	1.00	250.00	Research insurance laws.
06/25/2022	RPA	1.00	160.00	Research <i>Hapton vs. Interstate Insurance</i> .
07/22/2022	RPA	1.00	160.00	Communicate with Samantha Kessler regarding litigation.
07/23/2022	MLJ	1.00	250.00	Phone call with Tom Alberts of Alberts Investigations regarding <u>Gilbert v. Federated</u> to discuss previous experience investigating insurance fraud, testifying in court, and payment for services. <i>(First report will be completed by the end of the month.)</i> Alberts was recommended by J. Edgerton of Edgerton & Lowe:
07/24/2022	MLJ	2.00	500.00	Phone call with Sam Kessler.
07/25/2022	PAM	2.50	562.50	Communicate (with client).
07/26/2022	RPA	3.00	480.00	Research.
08/19/2022	RPA	1.50	240.00	Office conference with John Kessler.
08/20/2022	RPA	2.30	368.00	Outside conference with Andrew Gilbert.
	RPA	1.30	208.00	Office conference with Samantha Kessler.
08/23/2022	MLJ	1.40	350.00	Drafted deposition notice with document request.
Client Total:		21.40	4,342.50	
Totals:		21.40	4,342.50	

Report Writer Name CLNTTIM

The Client Time Summary report is a Report Writer report included with PracticeMaster and can be modified as desired. The Client Time Summary will generate a list of all fee entries by client for a specified range of Client IDs, dates, and timekeepers. The report is sorted by Client ID, date, and timekeeper initials. However, the report can optionally be printed in timekeeper order and sorted by timekeeper, Client ID, and date. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Client Expense Summary

Date: 08/23/2022		Client Expense Summary		Page: 1
Jensen, Martin & Anderson, P.C.				
Client Range:	100.00 to 200.00			
Date Range:	07/01/2022 to 07/31/2022			
Timekeeper Range:	1 to 999			
Client ID:	101.00	Williams/John State v. Williams Criminal Law		
Date	Tmkr	Amount	Description	
07/16/2022	RPA	1.25	Facsimile costs.	
07/19/2022	RPA	47.50	Courier fee Federal Express.	
07/26/2022	RPA	30.00	Photocopy charges.	
	PAM	7.35	Photocopy charges.	
07/29/2022	PAM	4.00	Online legal research	
Client Total:		90.10		
Client ID:	102.00	Gilbert/Andrew C. Auto Accident Personal Injury Law		
Date	Tmkr	Amount	Description	
07/23/2022	MLJ	6.75	Photocopy charges.	
	PAM	17.78	Postage	
Client Total:		24.53		
Client ID:	121.01	Phillips/Marcus Real Estate Acquisition Real Estate Law		
Date	Tmkr	Amount	Description	
07/19/2022	MLJ	35.00	Courier fee.	
07/23/2022	MLJ	75.00	Filing fee.	
	MLJ	15.00	Film development.	
07/26/2022	MLJ	13.75	Long distance telephone charges.	
	MLJ	24.75	Travel expense.	
	MLJ	13.75	Long distance telephone charges.	
	MLJ	75.00	Courier fee (200) United Parcel Service	
Client Total:		252.25		
Totals:		366.88		

Report Writer Name CLNTEXP

The Client Expense Summary report is a Report Writer report included with PracticeMaster and can be modified as desired. This report will generate a list of all cost entries for a range of Client IDs, dates, and timekeepers. The report is sorted by Client ID, date, and timekeeper initials. However, the report can optionally be printed in timekeeper order and sorted by timekeeper, Client ID, and date. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Journal by Type

Date: 08/23/2022	Journal by Type		Page: 1	
		Jensen, Martin & Anderson, P.C.		
Client Range:	to	Journal Type(s):	T,P,N,E,B	
Date Range:	07/23/2022 to 08/23/2022			
Timer Records				
07/27/2022	Phone call with Michael Larson about case. He needs to check on exact dates when previous maintenance was performed and get back to me.			
	User: RON 09:20 AM Duration: 0:34:27			
	100.00 Larson/Michael			
	WC Larson v. Bel-Cor			
Phone Records				
08/21/2022	Phone conference with potential client, Susan McDonald.			
	User: MLJ 11:02 AM	Duration: 0:52:38	402-474-9876	
	Spoke With: Yes	Returned Call: No	Left Message: No	Voice Message: No
	Contact: David M. Roth			
Client Note Records				
07/26/2022	07/26/2022 09:45a KIM			
	Mr. Klein suffered a broken leg and a back injury when falling from faulty scaffolding while working. He was working construction at the time for Simmons Construction Company. Mr. Klein missed four months of work. Preliminary information indicates approximate settlement of \$150,000.00 for medical expenses and loss of wages.			
	User: KENDRA 09:45 AM			
	120.01 Klein/Daniel P.			
	WC Klein vs. Simmons Construction			
Email Records				
08/23/2022	Mr. Larson,			
	Please sign the attached fee agreement and return it to our office.			
	Sincerely, Mr. Jensen			
	User: MLJ 03:01 PM			
	To: mlarson@larson.com	CC: mjensen@jensenmartinlaw.com		
	From: OfficeMgr@jensenmartinlaw.com	BCC:		
	Subject: Fee Agreement			
	100.00 Larson/Michael			
	WC Larson v. Bel-Cor			

Report Writer Name **JRNLTYP**

The Journal by Type Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes journal records sorted by type and by date. You can specify a range of Client IDs and dates as well as which journal record types to include on the report [i.e., T (timer records), P (phone records), R (research records), N (note records), E (email records), B (billing note records)]. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Journal by Date

Date: 08/23/2022	Journal by Date		Page: 1
Client Range: to		Journal Type(s):	T,P,N,E,B
Date Range: 07/24/2022 to 08/23/2022			
07/26/2022	07/26/2022 09:45a KIM Mr. Klein suffered a broken leg and a back injury when falling from faulty scaffolding while working. He was working construction at the time for Simmons Construction Company. Mr. Klein missed four months of work. Preliminary information indicates approximate settlement of \$150,000.00 for medical expenses and loss of wages.		
	Type: Client Note User: KENDRA 09:45 AM 120.01 Klein/Daniel P. WC Klein vs. Simmons Construction		
07/26/2022	Phone call with Michael Larson about case. He needs to check on exact dates when previous maintenance was performed and get back to me.		
	Type: Timer User: MLJ 09:20 AM Duration: 0:34:27 100.00 Larson/Michael WC Larson v. Bel-Cor		
07/29/2022	Federated requires that we submit bills using the Litigation task code set outlined in the Uniform Task-Based Management System.		
	Type: Billing Note 200.02 Peterson Insurance Co. ADMIN Maintenance of Insurance Policies		
08/21/2022	Phone conference with potential client, Susan McDonald.		
	Type: Phone User: MLJ 11:02 AM Duration: 0:52:38 402-474-9876 Spoke With: Yes Returned Call: No Left Message: No Voice Message: No Contact: David M. Roth		
08/23/2022	Mr. Larson, Please sign the attached fee agreement and return it to our office. Sincerely, Mr. Jensen		
Comments:	Type: Email User: MLJ 03:01 PM To: mlarson@larson.com CC: mjensen@jensenmartinlaw.com From: OfficeMgr@jensenmartinlaw.com BCC: Subject: Fee Agreement 100.00 Larson/Michael WC Larson v. Bel-Cor		

Report Writer Name

JRNLDAT

The Journal by Date Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes journal records sorted by date and by type. You can specify a range of Client IDs and dates as well as which journal record types to include on the report [*i.e.*, T (timer records), P (phone records), R (research records), N (note records), E (email records), B (billing note records)]. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Daily Timer Log

Date: 08/23/2022		Daily Timer Log				Page: 1
		Jensen, Martin & Anderson, P.C.				
Date Range:	08/23/2022	to	08/23/2022			
User	Date	First Time	Duration	Hours	Client ID	Description
MLJ	08/23/2022	09:00 AM	1:27:04	1.45	121.01	Discussed previous owner's responsibilities.
	08/23/2022	11:02 AM	0:52:38	0.88		Phone conference with potential client, Susan McD
	08/23/2022	12:25 PM	0:36:02	0.60		Meeting with potential client, Joseph Harrington
	08/23/2022	01:05 PM	1:36:29	1.61		Meeting with Harold re: insurance policies held
Daily Total:				4.54		

Report Writer Name **DAILYTMR**

The Daily Timer Log shows a list of timer records by day. This report can be modified.

Timer Fee Report

Date: 08/23/2022		Timer Fee Report		Page: 1
		Jensen, Martin & Anderson, P.C.		
Client:	1.00			
Date:	08/22/2022			
Description:	Meeting with Sarah Bennett			
Timekeeper:	2, Paula Ann Martin			
Hours:	0.80			
Amount:	180.00			
Record Type	Due Date	Duration	Description	
T	08/22/2022	0.72	Meeting with Sarah Bennett	
		0.72	Hours	

Menu [File](#) | [Open](#) | [Fee](#) | [Edit](#) | [Report](#) | [Timer Fee Report](#)

The Timer Fee Report allows you to view or print a fee record and any associated journal tasks used to create the fee record. When displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. This report cannot be modified.

Note Report

Date: 08/23/2022		Note Report		Page: 1
		Jensen, Martin & Anderson, P.C.		
120.01	Klein/Daniel P.	Klein vs. Simmons Construction		
07/27/2022 09:45a KIM				
Mr. Klein suffered a broken leg and a back injury when falling from faulty scaffolding while working. He was working construction at the time for Simmons Construction Company. Mr. Klein missed four months of work. Preliminary information indicates approximate settlement of \$150,000.00 for medical expenses and loss of wages.				

Report Writer Name **NOTE**

The Note Report allows you to view or print a note record. When displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the associated client record.

Detail Fee Recap

Date: 08/23/2022	Detail Fee Recap			Page: 1
Jensen, Martin & Anderson, P.C.				
Timekeeper # 3: RPA - Ronald P. Anderson				
	Wrk Hrs	Amount	Description	
Mon, Aug 22	1.50	240.00	102.00 Gilbert/Andrew C. - Office conference with John Kessler.	
	0.60 NB	96.00	200.02 Peterson Insurance Co. - Preparation of proposal for Mid-State Insurance	
	2.10	336.00		
	Wrk Hrs	Amount	Description	
Tue, Aug 23	2.30	368.00	102.00 Gilbert/Andrew C. - Outside conference with Andrew Gilbert.	
	1.30	208.00	102.00 Gilbert/Andrew C. - Office conference with Samantha Kessler.	
	3.60	576.00		
Totals:	5.70	912.00		

Report Writer Name *FeeDtRcp*

The Detail Fee Recap report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes total worked hours, amount, and description for all fees during the specified period. Non-billable fees are designated by a NB to the right of the Wrk Hrs column. Fees are sorted first by timekeeper, then by date. You can specify a range of Client IDs, timekeepers, and fee dates.

Weekly Fee Recap

Date: 08/23/2022	Weekly Fee Recap															Page: 1					
Jensen, Martin & Anderson, P.C.																					
Timekeeper # 1: MLJ - Michael L. Jensen																					
For the week of: 08/15/2022 through 08/19/2022																					
	Mon	15		Tue	16		Wed	17		Thu	18		Fri	19		Sat / Sun		Total	Total	Total	
	Bill	NB	Total	Bill	NB	Total	Bill	NB	Total	Bill	NB	Total	Bill	NB	Total	Bill	NB	Total	Bill	NB	Hours
	7.85	0.00	7.85	6.10	1.00	7.10	1.90	0.00	1.90	5.00	0.00	5.00	7.70	0.00	7.70	0.00	0.00	0.00	43.55	0.00	38.75

Report Writer Name *FeeWkRcp*

The Weekly Fee Recap report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be run for a specific billing timekeeper and will display billable, non-billable, and total hours worked for each day of the specified week. A grand total is also displayed. The week to print is dependent on the date entered in the runtime prompt in relation to the calendar week. A date that falls on a Monday through a Saturday will display the calendar week leading up to that Saturday; a date that falls on a Sunday will display the calendar week that begins that Sunday.

Note: A billing timekeeper must be specified in the runtime prompt for this report to be generated properly. Leaving the Billing Timekeeper prompt blank will result in a "Nothing Printed" message.

Billable/Non-Billable Hours Recap

Date: 08/23/2022		Billable/Non-Billable Hours Recap			Page: 1
Jensen, Martin & Anderson, P.C.					
Client Range:	to				
Date Range:	08/15/2022	to	08/23/2022		
Timekeeper Range:	1	to	999		
Timekeeper # 1: Michael L. Jensen					
	Billable	Non-Bill	Amount	Description	
Mon, Aug 15	4.25		2,125.00	415.00 MegaConstruction Corporation - Prepare Financial Disclosure Form	
	1.50		375.00	200.02 Peterson Insurance Co. - Telephone call to client; prepared trust transfer d	
	0.70		175.00	120.01 Klein/Daniel P. - Draft and revise letter to opposing attorney	
	0.70		350.00	415.00 MegaConstruction Corporation - Receipt of request for changes to docume	
	0.70		175.00	200.02 Peterson Insurance Co. - Office conference regarding allocation of assets.	
	<u>7.85</u>		<u>3,200.00</u>		
	Billable	Non-Bill	Amount	Description	
Tue, Aug 16	3.00		750.00	200.01 Peterson Insurance Co. - Revised letter to client explaining gifting strategie	
	3.00		750.00	200.01 Peterson Insurance Co. - Attended department quarterly meeting; researc	
	2.50		625.00	200.02 Peterson Insurance Co. - Reviewed and analyzed new insurance illustratio	
	1.50		375.00	200.01 Peterson Insurance Co. - Reviewed corporate minute book & files regardin	
	1.20		300.00	200.01 Peterson Insurance Co. - Drafted guaranty.	
	0.90		225.00	200.01 Peterson Insurance Co. - Reviewed fax from client; reviewed documents in	
	<u>12.10</u>		<u>3,025.00</u>		
	Billable	Non-Bill	Amount	Description	
Wed, Aug 17	6.00		3,000.00	415.00 MegaConstruction Corporation - Prepare Notice and Articles of Dissolution	
	1.40		350.00	100.00 Larson/Michael - Reviewed file; worked on estate plan documents; studied	
	1.20		330.00	121.01 Phillips/Marcus - Telephone call to client regarding letter from anti-defamat	
	0.30		75.00	120.01 Klein/Daniel P. - Telephone conference with Labour Plating Company.	
	<u>8.90</u>		<u>3,755.00</u>		
	Billable	Non-Bill	Amount	Description	
Thu, Aug 18	5.00		2,500.00	415.00 MegaConstruction Corporation - Prepare Financial Disclosure Form	
	5.00		2,500.00		
	Billable	Non-Bill	Amount	Description	
Fri, Aug 19	4.00		1,100.00	121.01 Phillips/Marcus - Worked on option agreement; contract for sale and attac	
	1.80		495.00	121.01 Phillips/Marcus - Reviewed note, deed of trust and easement; drafted corr	
	1.50		375.00	101.00 Williams/John - Reviewed correspondence from opposing counsel; teleph	
	1.40		350.00	102.00 Gilbert/Andrew C. - Drafted deposition notice with document request.	
	1.00		250.00	850.01 White/Kelly - Studied and analyzed alternatives for client to accomplish est	
	<u>9.70</u>		<u>2,570.00</u>		
	Billable	Non-Bill	Amount	Description	
Mon, Aug 22		1.00	0.00	415.00 MegaConstruction Corporation - Prepare Employee Handbook	
		1.00	0.00		
Totals:	<u>43.55</u>	<u>1.00</u>	<u>15,050.00</u>		

Report Writer Name **FeeHrRcp**

The Billable/Non-Billable Hours Recap is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes fee records sorted first by working timekeeper, then date. Billable and non-billable hours worked are displayed in separate columns. A grand total is included for each timekeeper. You can specify a range of Client IDs, timekeepers, and fee dates.

Total Worked Hours for the Week

Date: 08/23/2022		Total Worked Hours for the Week Jensen, Martin & Anderson, P.C.					Page: 1	
Timekeeper # 1: MLJ - Michael L. Jensen								
For the week of: 08/15/2022 through 08/21/2022								
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total	
15	16	17	18	19	20	21	Hours	
6.50	3.45	5.10	6.65	3.10	0.00	0.00	24.80	

Report Writer Name *FeeHrsWk*

The Total Worked Hours for the Week report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes total billable and non-billable hours worked for the specified timekeeper. The week to print is dependent on the date entered in the runtime prompt in relation to the calendar week. A date that falls on a Monday through a Saturday will display the calendar week leading up to that Saturday; a date that falls on a Sunday will display the calendar week that begins that Sunday.

Note: A billing timekeeper must be specified in the runtime prompt for this report to be generated properly. Leaving the Billing Timekeeper prompt blank will result in a "Nothing Printed" message.

Fee Report

Date: 08/23/2022

Fee Report

Jensen, Martin & Anderson, P.C.

Page: 1

Client ID	Date	Description
1.00	08/23/2022	CLE session on Practice Management systems.

Client ID	Date	Description
100.00	07/26/2022	Attend deposition of Susan Nichols.
100.00	06/24/2022	Open Workers' Comp Case
100.00	06/21/2022	Initial Client Meeting
100.00	07/23/2022	Request for employment records.
100.00	07/23/2022	Verify receipt of medical records request.
100.00	06/25/2022	Consultation with Susan Nichols re: potential witness
100.00	08/13/2022	Confirm Fee Agreement signed and returned.
100.00	08/26/2022	Legal research
100.00	08/26/2022	Draft and revise legal opinion to be forwarded to Labour Plating Company on their culpability.
100.00	07/26/2022	Meeting with Labour Plating to discuss compensation.
100.00	07/26/2022	Appointment at Mr. Larson's office to ensure that proper environment is available for him to return to work with modifications necessary to medical status.
100.00	08/23/2022	Reviewed file; worked on estate plan documents; studied and analyzed additional information needed; call to client regarding same.

Client ID	Date	Description
101.00	05/28/2022	Legal research.
101.00	05/28/2022	Initial Client Meeting
101.00	06/25/2022	Telephone conference with client.
101.00	06/14/2022	Prepared for conference with client.
101.00	07/26/2022	Review and analyze case status.
101.00	07/23/2022	Reviewing documents.
101.00	07/26/2022	Legal Research.
101.00	07/26/2022	Legal research.
101.00	07/19/2022	Office conference with client.
101.00	07/23/2022	Talked to Mr. Williams
101.00	07/23/2022	Office conference with Mr. Williams.
101.00	07/24/2022	Office conference with Mr. Williams.
101.00	07/23/2022	Telephone conference with client.
101.00	07/23/2022	Telephone conference with Mr. Williams.
101.00	07/23/2022	Telephone conference with client.
101.00	08/16/2022	Letter to client.
101.00	08/13/2022	Review and analyze research and prior cases.
101.00	08/23/2022	Reviewed correspondence from opposing counsel; telephone conference with opposing counsel re: settlement; telephone call to court clerk re: continuing trial date.

Client ID	Date	Description
102.00	08/19/2022	Office conference with John Kessler.
102.00	07/17/2022	Initial Client Meeting
102.00	08/20/2022	Outside conference with Andrew Gilbert.
102.00	05/24/2022	Claims Adjuster appointed & contacted?
102.00	05/17/2022	Review/analyze possible strategies.
102.00	06/24/2022	Research insurance laws.
102.00	04/24/2022	Manage data/files.
102.00	07/22/2022	Communicate with Samantha Kessler regarding litigation.
102.00	06/25/2022	Research <i>Hapton vs. Interstate Insurance</i> .
102.00	08/20/2022	Office conference with Samantha Kessler.
102.00	07/24/2022	Phone call with Sam Kessler.
102.00	07/25/2022	Communicate (with client).
102.00	07/26/2022	Research.
102.00	07/23/2022	Phone call with Tom Alberts of Alberts Investigations regarding <u>Gilbert v. Federated</u> to discuss previous experience investigating insurance fraud, testifying in court, and payment for services. <i>(First report will be completed by the end of the month.)</i> Alberts was recommended by J. Edgerton of Edgerton & Lowe.
102.00	08/23/2022	Drafted deposition notice with document request.
102.00	04/27/2022	Filed preliminary claim with court.

Report Writer Name **FEERPT**

The Fee Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report includes the date and description for all fee transactions for the selected range of clients. The report is sorted by Client ID.

Client Document Management Report

Date: 08/23/2022

Client Document Management Report
Jensen, Martin & Anderson, P.C.

Page: 1

Client Range: 120.01 to 120.01
Date Range: mm/dd/yyyy to 08/23/2022Client ID: 120.01 - Klein/Daniel P.
Klein vs. Simmons Construction
AOP: Workers' Compensation

Date	Document	Created By	Resp. User
07/21/2022	Thu Assembled\Klein_Daniel P_\120\01\FEE-Fee Agreement.doc Description: Fee Agreement Contact: Daniel P. Klein Doc Type: Fee Agreement Created On: 07/21/2022 08:45 AM Modified On: 07/21/2022 08:45 AM Status: Available	RON	RON
07/21/2022	Thu Assembled\Klein_Daniel P_\120\01\MEDREC-Medical Release.do Description: Medical Release Contact: Bryan LGH East Hospital Doc Type: Medical Records Created On: 07/21/2022 02:22 PM Modified On: 07/21/2022 02:22 PM Status: Available	RON	RON
07/21/2022	Thu Assembled\Klein_Daniel P_\120\01\NOT-Notice of Claim.doc Description: Notice of Claim Doc Type: Notice Created On: 07/21/2022 02:54 PM Modified On: 07/21/2022 02:54 PM Status: Available	RON	RON
07/21/2022	Thu Assembled\Klein_Daniel P_\120\01\FORM-Policies.doc Description: Policies Contact: Daniel P. Klein Doc Type: Form Created On: 07/21/2022 08:50 AM Modified On: 07/21/2022 08:50 AM Status: Available	RON	RON
07/21/2022	Thu Assembled\Klein_Daniel P_\120\01\FORM-Employment Release Description: Employment Release and Authorization Doc Type: Form Created On: 07/21/2022 01:47 PM Modified On: 07/21/2022 01:47 PM Status: Available	RON	RON

Report Writer Name **DOCMGMT**

The Client Document Management Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of User IDs and dates. You can also specify the Document Type to be searched as well as enter alpha serial for specific assembled document names. The report is sorted by Client ID, date, and timekeeper. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Document Check Out Report

Date: 08/23/2022		Document Check Out Report Jensen, Martin & Anderson, P.C.			Page: 1
User Range:	MLJ	to	MLJ		
Date Range:	mm/dd/yyyy	to	08/23/2022		
User:	Michael L. Jensen				
Check Out Date/Time	Client ID	Client Name	Work Description	Document Name	Document Description
08/23/2022 08:50 AM	100.00	Larson/Michael	Larson v. Bel-Cor	LTR-Referral Letter.doc	Referral Letter
08/23/2022 08:50 AM	100.00	Larson/Michael	Larson v. Bel-Cor	REC-Employment Records Request.	Employment Records Request
08/23/2022 08:50 AM	100.00	Larson/Michael	Larson v. Bel-Cor	FEE-Fee Agreement.doc	Fee Agreement

Report Writer Name _DOCOUT

The Document Check Out Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of User IDs and dates. You can also search for specific document types or enter a document name to filter your search. The report is sorted by date and User ID. Drill-down editing capabilities allow you to access client records directly from the Preview window.

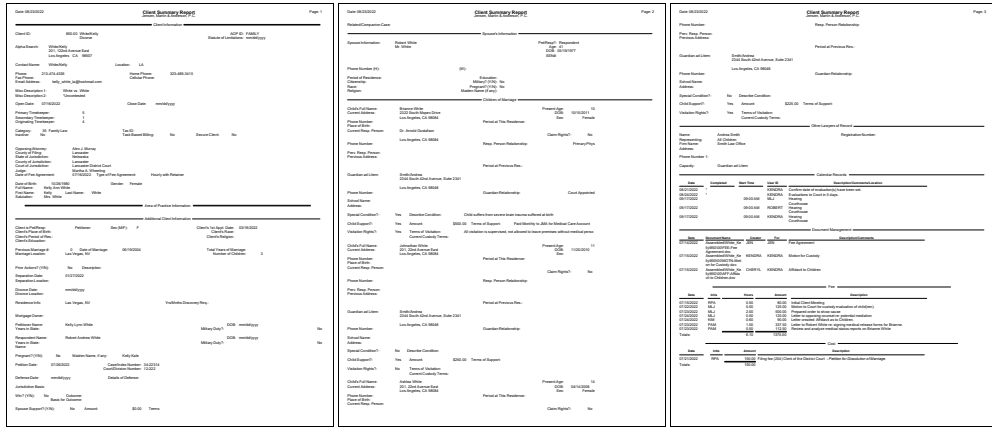
Statute of Limitations Report

Date: 08/23/2022		Statute of Limitations Report Jensen, Martin & Anderson, P.C.			Page: 1
07/18/2024	04/20/2022	OPEN Client	PA	PI	
	ID: 102.00		File No:		
	Client Name: Gilbert/Andrew C.				
	Description: Auto Accident				
	Contact: Gilbert/Andrew C.				
	8974 Weatherby Road				
	Roswell NM 88277		929-885-9055		
09/23/2024	06/24/2022	OPEN	MLJ	WC	
	Client ID: 100.00		File No: 92110001		
	Client Name: Larson/Michael				
	Description: Larson v. Bel-Cor				
	Contact: Larson/Michael				
	123 Washington St.				
	Lincoln NE 68508		402-474-4651		

Report Writer Name _STATUTE

The Statute of Limitations Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of Client IDs, statute of limitation dates, and primary timekeepers. The report can optionally be printed in primary timekeeper order. The report is sorted by statute of limitations date and then Client ID. However, if the report is run in timekeeper order, clients are first sorted by primary timekeeper. Each timekeeper's list will begin on a new page. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Client Summary Report



Click on an image to view the full-size sample images which can be found on pages 43-45.

Report Writer Name **CLNTSUM**

The Client Summary Report shown above and on pages 43-45 is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of Client IDs. The Client Summary Report is a summary of all information that has been entered for a specific client. The report can be customized for each Area of Practice. Drill-down editing capabilities allow you to edit records directly from the Preview window.

Calendar Entries

* (asterisk) An asterisk next to a calendar entry indicates the calendar entry is a task.

Journal Entries

Journal Type

The journal type is represented by a single alpha character shown between the Date and Time columns. The journal types include:

- P = Phone record.
- T = Timer record.
- R = Research record.
- E¹ = Email record.
- N¹ = Note record.
- B = Billing Notes record (from Tabs3).

¹ Not shown on sample report.

Date: 08/23/2022

Client Summary Report
Jensen, Martin & Anderson, P.C.

Page: 1

Client Information

Client ID: 850.00 White/Kelly Divorce
 Alpha Search: White/Kelly
 201, 122nd Avenue East
 Los Angeles CA 98507
 Contact Name: White/Kelly Location: LA
 Phone: 213-474-4336 Home Phone: 323-489-3410
 Fax Phone: Cellular Phone:
 Email Address: kelly_white_la@hushmail.com
 Misc Description 1: White vs. White
 Misc Description 2: *Uncontested
 Open Date: 07/16/2022 Close Date: mm/dd/yyyy
 Primary Timekeeper: 5
 Secondary Timekeeper: 1
 Originating Timekeeper: 4
 Category: 35 Family Law Tax ID:
 Inactive: No Task Based Billing: No Secure Client: No
 AOP ID: FAMILY
 Statute of Limitations: mm/dd/yyyy
 Opposing Attorney: Alex J. Murray
 County of Filing: Lancaster
 State of Jurisdiction: Nebraska
 County of Jurisdiction: Lancaster
 Court of Jurisdiction: Lancaster District Court
 Judge: Martha A. Wheeling
 Date of Fee Agreement: 07/16/2022 Type of Fee Agreement: Hourly with Retainer
 Date of Birth: 10/26/1980 Gender: Female
 Full Name: Kelly Ann White
 First Name: Kelly Last Name: White
 Salutation: Mrs. White

Area of Practice Information

Additional Client Information

Client is Pet/Resp: Petitioner Sex (M/F): F Client's 1st Appt. Date: 03/18/2022
 Client's Place of Birth: Client's Race:
 Client's Period of Res.: Client's Religion:
 Client's Education:
 Previous Marriage #: 0 Date of Marriage: 06/19/2004 Total Years of Marriage:
 Marriage Location: Las Vegas, NV Number of Children: 3
 Prior Actions? (Y/N): No Description:
 Separation Date: 01/27/2022
 Separation Location:
 Divorce Date: mm/dd/yyyy
 Divorce Location:
 Residence Info: Las Vegas, NV Yrs/Mnths Discovery Req.:
 Mortgage Owner:
 Petitioner Name: Kelly Lynn White DOB: mm/dd/yyyy
 Years in State: Military Duty?: No
 Respondent Name: Robert Andrew White DOB: mm/dd/yyyy
 Years in State: Military Duty?: No
 Name:
 Pregnant? (Y/N): No Maiden Name, if any: Kelly Kale
 Petition Date: 07/26/2022 Case/Index Number: 34-22314
 Court/Division Number: 12-222
 Defense Date: mm/dd/yyyy Details of Defense:
 Jurisdiction Basis:
 Win? (Y/N): No Outcome:
 Basis for Outcome:
 Spouse Support? (Y/N): No Amount: \$0.00 Terms:

Date: 08/23/2022

Client Summary Report
Jensen, Martin & Anderson, P.C.

Page: 2

Related/Companion Case:

Spouse's Information

Spouse Information: Robert White
Mr. White

Pet/Resp?: Respondent
Age: 41
DOB: 05/19/1977
SSN#:

Phone Number (H): (W):

Period of Residence: Education:
Citizenship: Military? (Y/N): No
Race: Pregnant? (Y/N): No
Religion: Maiden Name (if any):

Children of Marriage

Child's Full Name: Brianne White
Current Address: 2322 South Mopec Drive
Los Angeles, CA 98084

Present Age: 10
DOB: 10/15/2011
Sex: Female

Phone Number: Period at This Residence:

Place of Birth: Dr. Arnold Gustafson

Claim Rights?: No

Current Resp. Person: Los Angeles, CA 98084

Resp. Person Relationship: Primary Phys

Phone Number:
Prev. Resp. Person:
Previous Address:

Period at Previous Res.:

Guardian ad Litem: Smith/Andrea
2344 South 42nd Avenue, Suite 2341

Los Angeles, CA 98048

Phone Number: Guardian Relationship: Court Appointed

School Name:
Address:

Special Condition?: Yes Describe Condition: Child suffers from severe brain trauma suffered at birth

Child Support?: Yes Amount: \$500.00 Terms of Support: Paid Monthly to JMA for Medical Care Account

Visitation Rights?: Yes Terms of Visitation: All visitation is supervised, not allowed to leave premises without medical perso
Current Custody Terms:

Child's Full Name: Johnathan White
Current Address: 201, 22nd Avenue East
Los Angeles, CA 98084

Present Age: 11
DOB: 11/20/2010
Sex:

Phone Number: Period at This Residence:

Place of Birth: Current Resp. Person:

Claim Rights?: No

Phone Number:

Resp. Person Relationship:

Prev. Resp. Person:
Previous Address:

Period at Previous Res.:

Guardian ad Litem: Smith/Andrea
2344 South 42nd Avenue, Suite 2341

Los Angeles, CA 98048

Phone Number: Guardian Relationship:

School Name:
Address:

Special Condition?: No Describe Condition:

Child Support?: Yes Amount: \$250.00 Terms of Support:

Visitation Rights?: No Terms of Visitation:
Current Custody Terms:

Child's Full Name: Ashlea White
Current Address: 201, 22nd Avenue East
Los Angeles, CA 98084

Present Age: 14
DOB: 04/14/2008
Sex: Female

Phone Number: Period at This Residence:

Place of Birth: Current Resp. Person:

Claim Rights?: No

Date: 08/23/2022

Client Summary Report
Jensen, Martin & Anderson, P.C.

Page: 3

Phone Number: Resp. Person Relationship:
Prev. Resp. Person: Previous Address:

Period at Previous Res.:

Guardian ad Litem: Smith/Andrea
2344 South 42nd Avenue, Suite 2341
Los Angeles, CA 98048

Phone Number: Guardian Relationship:

School Name:
Address:

Special Condition?: No Describe Condition:

Child Support?: Yes Amount: \$225.00 Terms of Support:

Visitation Rights?: Yes Terms of Visitation:
Current Custody Terms:

Other Lawyers of Record

Name: Andrea Smith Registration Number:
Representing: All Children
Firm Name: Smith Law Office
Address:

Phone Number 1:

Capacity: Guardian ad Litem

Calendar Records

Date	Completed	Start Time	User ID	Description/Comments/Location
08/21/2022	*		KENDRA	Confirm date of evaluation(s) have been set.
08/24/2022	*		KENDRA	Evaluations to Court in 5 days.
09/17/2022		09:00 AM	MLJ	Hearing Courthouse
09/17/2022		09:00 AM	ROBERT	Hearing Courthouse
09/17/2022		09:00 AM	KENDRA	Hearing Courthouse

Document Management

Date	Document Name	Creator	For	Description/Comments
07/14/2022	Assembled\White_Ke lly\850\00\FEE-Fee Agreement.doc	JEN	JEN	Fee Agreement
07/15/2022	Assembled\White_Ke lly\850\00\MOTN-Moti on for Custody.doc	KENDRA	KENDRA	Motion for Custody
07/15/2022	Assembled\White_Ke lly\850\00\AFF-Affida vit to Children.doc	CHERYL	KENDRA	Affidavit to Children

Fee

Date	Inits	Hours	Amount	Description
07/15/2022	RPA	0.50	80.00	Initial Client Meeting
07/22/2022	MLJ	0.50	125.00	Motion to Court for custody evaluation of child(ren).
07/23/2022	MLJ	2.00	500.00	Prepared order to show cause
07/24/2022	MLJ	0.50	125.00	Letter to opposing counsel re: potential mediation
07/24/2022	KIM	0.60	90.00	Letter created: Affidavit as to Children.
07/23/2022	PAM	1.50	337.50	Letter to Robert White re: signing medical release forms for Brianne.
07/23/2022	PAM	0.50	112.50	Review and analyze medical status reports on Brianne White
Totals:		6.10	1370.00	

Cost

Date	Inits	Amount	Description
07/21/2022	RPA	150.00	Filing fee (204) Clerk of the District Court - <i>Petition for Dissolution of Marriage</i> .
Totals:		150.00	

Contact Search Report

Date: 08/23/2022	Contact Search Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: PETERSON		
Peterson Insurance Co. Insurance Companies <i>Full Name: Peterson Insurance Co.</i> <i>Organization: Peterson Insurance Co.</i>	Contact	Modified: 08/10/2022
200.01 Peterson Insurance Co. General Legal Counsel <i>Client Name: Peterson Insurance Co.</i>	Client	Modified: 06/25/2022 Primary: 1 MLJ
200.02 Peterson Insurance Co. Maintenance of Insurance Policies <i>Client Name: Peterson Insurance Co.</i>	Client	Modified: 05/24/2022 Primary: 3 RPA
Franklin/Paul Client Contact; Insurance Agent <i>Organization: Peterson Insurance Co.</i>	Contact	Modified: 07/19/2022
Youlteck/Larry <i>Organization: Peterson Insurance Co.</i>	Contact	Modified: 07/19/2022
PETERSON found in 5 records		

The Contact Search Report is generated after every contact search is performed. A Print dialog box is displayed immediately after the search is completed. When the report is displayed using the **Preview** option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record where the contact is located. Each contact found is printed in bold with a shaded background.

Conflict of Interest Report

Date: 08/23/2022	Conflict of Interest Report Jensen, Martin & Anderson, P.C.	Page: 1
Whole word search for: ROBERT and WHITE		
850.00 White/Kelly Divorce	Document Management	Modified: 08/19/2022 Primary: 5 KIM
<i>Document Name:</i> <u>20220819-Affidavit to Children.doc</u> -the Marriage of: Kelly Lynn White , Petitioner, and Robert Andrew White , Respondent. COMES NOW the petitioner -children are as follows: Brianne White 2322 South Mopec Drive Los Angeles, CA 98084 Johnathan White 201, 22nd Avenue East L -Angeles, CA 98084 Ashlea White 201, 22nd Avenue East Los -years is as follows: Brianne White Kelly White & Robert White 2322 South Mopec Drive Los -Angeles, CA 98084 Johnathan White Kelly White & Robert White 201, 22nd Avenue East Los -Angeles, CA 98084 Ashlea White Kelly White & Robert White 201, 22nd Avenue East Los -BY HEARING _____ Kelly Lynn White STATE OF NEBRASKA ss. COUNTY -Esq. Attorney for Kelly Lynn White Filename: 20220819-Affidavit to Children.doc		
850.00 White/Kelly Divorce	Document Management	Modified: 08/19/2022 Primary: 5 KIM
<i>Document Name:</i> <u>20220819-Motion for Custody.doc</u> -the Marriage of: Kelly Lynn White , Petitioner, and Robert Andrew White , Respondent. COMES NOW THE Petitioner		
850.00 White/Kelly Divorce	Journal: Email	Modified: 08/23/2022 Primary: 5 KIM
<i>Email Body:</i> Robert White <i>Email Attachments:</i> <u>RW - Completed Release Forms for Brianne.pdf</u> -- Timekeeper Rat 850.02M White /Kelly RE: Medical Care of ----- 850.00M White /Kelly RE: Divorce 1 - Timekeeper Rat 850.01M White /Kelly RE: Last Will & Testam		
120.01 Klein/Daniel P. Klein vs. Simmons Construction	Fee	Modified: 08/15/2022 Primary: 3 RPA
<i>Description:</i> Spoke with Mr. Klein to verify that Robert White was not present at the time of the accident.		
850.00 White/Kelly Divorce	Fee	Modified: 08/15/2022 Primary: 5 KIM
<i>Description:</i> Letter to Robert White re: signing medical release forms for Brianne.		
850.00 White/Kelly Divorce	Additional Client Information	Modified: 07/28/2022 Primary: 5 KIM
<i>Petitioner's Full Name:</i> Kelly Lynn White <i>Respondent's Full Name:</i> Robert Andrew White		
ROBERT and WHITE found in 6 records		
Worldox Conflict Search		
T:\WORLDQX\CLIENTS\850\00\00009075.DOC 20220822-Motion for Custody		
1 match was found in Worldox.		

Menu

[Search | Conflict of Interest Search](#)

The Conflict of Interest Report is generated after every conflict of interest search is performed. A Print dialog box is displayed immediately after the search is completed. When the report is displayed using the Preview option, you can mouse over individual records or documents and with a click of the mouse immediately drill down to the field and individual record or document where the conflict is located.

Inactive clients are shown on the report with brackets around the Client ID. Records are sorted on the report in the following order: Client file, Journal file, Calendar file, Document Management file, Fee file, Cost file, Contact file, and AOP files (provided all files are searched).

The **Modified** date (the last change to the record) is shown on the report, indicating the age of the data. Note that this date is for any change, not limited to History Tracking, and includes changes from utilities (e.g., the Verify Documents utility updates Document Management records when linked documents have been changed).

The report shown on the previous page includes the Wordox documents that contain the search text.

Document Management Records

The Conflict of Interest Report shown to the left includes conflicts found in document management records. You have the ability to search document management records, linked documents, and email attachments.

PracticeMaster Files: Each conflict found is printed in bold with a shaded background.

Document Management Records: The document name is shaded. The name of the field that holds the document name is shown in italics above the document name. Each conflict found is shown on a separate line beginning with a dash, and including surrounding text. Conflicts found are shown in bold.

Email Attachments: The email attachment file name is shaded. Each conflict found is shown on a separate line beginning with a dash, and including surrounding text. Conflicts found are shown in bold.

Customize the Conflict of Interest Report

You can customize PracticeMaster to include additional fields on the Conflict of Interest report. Both Conflict of Interest Reports shown search for the same information; however, the second Conflict of Interest Report shown has been customized to include the responsible user from the Document Management file as well as the respondent's full name, the maiden name of the client contact, and the spouse's name from the Family Law Area of Practice. Customized fields that are blank will not print on the report.

Date: 08/23/2022

Conflict of Interest Report
Jensen, Martin & Anderson, P.C.

Page: 1

Whole word search for: **ROBERT** and **WHITE**

850.00 White/Kelly	Document Management	Modified: 08/23/2022
Divorce		Primary: 5 KIM

Responsible: KENDRA

*Document Name:*20220823-Affidavit to Children.doc

-the Marriage of: Kelly Lynn **White**, Petitioner, and **Robert** Andrew **White**, Respondent. COMES NOW the petitioner
 -children are as follows: Brianne **White** 2322 South Mopec Drive Los Angeles, CA 98084 Johnathan **White** 201, 22nd Avenue East L
 -Angeles, CA 98084 Ashlea **White** 201, 22nd Avenue East Los
 -years is as follows: Brianne **White** Kelly **White** & **Robert White** 2322 South Mopec Drive Los
 -Angeles, CA 98084 Johnathan **White** Kelly **White** & **Robert White** 201, 22nd Avenue East Los
 -Angeles, CA 98084 Ashlea **White** Kelly **White** & **Robert White** 201, 22nd Avenue East Los
 -BY HEARING _____ Kelly Lynn **White** STATE OF NEBRASKA ss. COUNTY
 -Esq. Attorney for Kelly Lynn **White** Filename: 20220823-Affidavit to Children.doc

850.00 White/Kelly	Document Management	Modified: 08/23/2022
Divorce		Primary: 5 KIM

Responsible: KENDRA

*Document Name:*20220823-Motion for Custody.doc

-the Marriage of: Kelly Lynn **White**, Petitioner, and **Robert** Andrew **White**, Respondent. COMES NOW THE Petitioner

120.01 Klein/Daniel P.	Fee	Modified: 08/23/2022
Klein vs. Simmons Construction		Primary: 3 RPA

Description: Spoke with Mr. Klein to verify that **Robert White** was not present at the time of the accident.

850.00 White/Kelly	Fee	Modified: 07/11/2022
Divorce		Primary: 5 KIM

Description: Letter to **Robert White** re: signing medical release forms for Brianne.

850.00 White/Kelly	Additional Client Information	Modified: 07/29/2022
Divorce		Primary: 5 KIM

Respondent's Full Name: Robert Andrew White
 Maiden Name, if any: Kelly Kale
Petitioner's Full Name: Kelly Lynn **White**
Respondent's Full Name: **Robert** Andrew **White**

850.00 White/Kelly	Spouse's Information	Modified: 07/28/2022
Divorce		Primary: 5 KIM

Spouse's Full Name: **Robert White**

ROBERT and **WHITE** found in 6 records

Worldox Conflict Search

T:\WORLD\CLIENTS\850\00\00009075.DOC 20220823-Motion for Custody

1 match was found in Worldox.

Document Search Report

Date: 08/23/2022

Document Search Report
Jensen, Martin & Anderson, P.C.

Page: 1

Whole word search for: **WHITE**

850.00 White/Kelly

Document Management

Modified: 08/21/2022

Divorce

Primary: 5 KIM

*Document Name:*AFF-Affidavit to Children.doc

-the Marriage of: Kelly Lynn **White**, Petitioner, and Robert Andrew **White**, Respondent. COMES NOW the petitioner
 -children are as follows: Brianne **White** 2322 South Mopec Drive Los Angeles, CA 98084 Johnathan **White** 201, 22nd Avenue Ea
 -Angeles, CA 98084 Ashlea **White** 201, 22nd Avenue East Los
 -years is as follows: Brianne **White** Kelly **White** & Robert **White** 2322 South Mopec Drive Los
 -Angeles, CA 98084 Johnathan **White** Kelly **White** & Robert **White** 201, 22nd Avenue East Los
 -Angeles, CA 98084 Ashlea **White** Kelly **White** & Robert **White** 201, 22nd Avenue East Los
 -BY HEARING _____ Kelly Lynn **White** STATE OF NEBRASKA ss. COUNTY
 -Esq. Attorney for Kelly Lynn **White** Filename: AFF-Affidavit to Children.doc

850.00 White/Kelly

Document Management

Modified: 08/14/2022

Divorce

Primary: 5 KIM

*Document Name:*MOTN-Motion for Custody.doc

-the Marriage of: Kelly Lynn **White**, Petitioner, and Robert Andrew **White**, Respondent. COMES NOW THE Petitioner

850.00 White/Kelly

Document Management

Modified: 07/07/2022

Divorce

Primary: 5 KIM

*Document Name:*FEE-Fee Agreement.doc

-Cushman Drive Lincoln, NE 68512 **402-423-1440** Kelly White 201, 22nd Avenue
 -the terms of this agreement. _____ Kelly White _____

850.01 White/Kelly

Document Management

Modified: 07/19/2022

Last Will & Testament

Primary: 5 KIM

*Document Name:*FORM-Will.pdf

-AND TESTAMENT OF KELLY ANN **WHITE** I, KELLY ANN **WHITE**, of Los Angeles, CA, revoke
 -unmarried. My children are Brianna **White**, Johnathan **White**, and Ashlea **White**. Reference in this Will to
 -ovember, 2015. _____ Kelly Ann **White** The foregoing instrument was, on
 -and declared by Kelly Ann **White** to be her Last Will
 -instrument, the said Kelly Ann **White** was, according to our best
 -OF LANCASTER) We, Kelly Ann **White**, _____, and _____, the testatrix
 -undue influence. _____ Kelly Ann **White** _____ Witness
 -before me by Kelly Ann **White**, the testatrix, and subscribed and

WHITE found in 4 records

Menu

[Search | Document Search](#)

The Document Search Report includes information found in document management records, linked documents, and email attachments that meet the search criteria.

Detail Contact List

Date: 08/23/2022	Detail Contact List Jensen, Martin & Anderson, P.C.		Page: 1
Category Range: to ZZZ	<u>Contact Category:</u>		
Administrative Account			
Administrative Account Administrative Account	Contact: Work Phone:		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Baldwin/Judy			
Judy Baldwin Lancaster District Court 1001 South 10th St. Room 201 Lincoln NE 68503 http://www.lancaster.ne.gov/discrt/index.htm	Contact: Work Phone: 402-474-5681		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Binder/Gregory			
Gregory Binder Lancaster District Court 1001 South 10th St. Room 201 Lincoln NE 68503 http://www.lancaster.ne.gov/discrt/index.htm	Contact: Work Phone: 402-474-5681		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Brown Court Reporting Services			
Brown Court Reporting Services Brown Court Reporting Services 915 E. Ketchikan Ave. Ste. 1004 Lincoln NE 68519 www.brownreporting.com	Contact: Brown/Stephanie J. Work Phone: 402-484-9157	Fax Phone: 402-484-9112	
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Daniels/Jeff W.			
Jeff W. Daniels Lancaster District Court 1001 South 10th St. Room 201 Lincoln NE 68503 http://www.lancaster.ne.gov/discrt/index.htm	Contact: Work Phone: 402-474-5681		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Gates, Lewis, Johnson & Stanton			
Gates, Lewis, Johnson & Stanton Gates, Lewis, Johnson & Stanton 122 Central Suite 1740 Denver CO 80202 www.gljslaw.com	Contact: Knight/Elizabeth M. Work Phone: 303-262-6060	Fax Phone: 303-262-6061	
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Hill/David A.			
David A. Hill Lancaster JP Court 1001 S. 10th St. Courtroom H Lincoln NE 68505	Contact: Work Phone: 402-474-5837		
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	
<hr/>			
Jefferson/Judith			
Judith Jefferson Nebraska Workers' Compensation Court State Capitol Building 13th Floor 1445 "K" Street Lincoln NE 68508 www.wcc.ne.gov	Contact: Work Phone: 402-471-2700	Fax Phone: 402-471-8231	
	First Contact Date: mm/dd/yyyy	Last Contact Date: mm/dd/yyyy	

Report Writer Name **RP_DET**

The Detail Contact List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts and contact categories.

Summary Contact List

Date: 08/23/2022	Summary Contact List Jensen, Martin & Anderson, P.C.	Page: 1
Category Range:	C to ZZZ	
<u>CLE Provider</u>		
	Nebraska State Bar Association	
<u>Client</u>		
	McBride/John	
	MegaConstruction Corporation	
<u>Client Contact</u>		
	Tatiki, Sr./James R.	
<u>Client Contact Insurance Agent</u>		
	Franklin/Paul	

Report Writer Name **RP_SUM**

The Summary Contact List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts and contact categories.

Duplicate Contacts Report

Date: 08/23/2022	Duplicate Contacts Jensen, Martin & Anderson, P.C.		Page: 1
<u>Contact ID</u>		<u>Name</u>	
Gilbert/Andrew C. (1)		Gilbert/Andrew C.	
Klein/Daniel P. (1)		Klein/Daniel P.	
Larson/Michael (1)		Larson/Michael	
McBride/John (1)		McBride/John	
Phillips/Marcus (1)		Phillips/Marcus	
White/Kelly (1)		White/Kelly	
White/Kelly (2)		White/Kelly	
White/Kelly (3)		White/Kelly	
Williams/John (1)		John Williams	
Williams/John (2)		John Williams	
Total:	10		

Report Writer Name **DUPLICAT**

The Duplicate Contacts Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of contacts in order to quickly identify duplicate contacts present within the software. The report includes a list of Contact IDs and associated Full Names along with a total for the number of duplicate contacts present.

Outlook Synchronization Report

Date: 08/23/2022		Outlook Synchronization Report Jensen, Martin & Anderson, P.C.			Page: 1
Sync Ran By:	CATHY				
Sync Date:	08/23/2022				
Sync Type:					
Action	Direction	Successful	Record Date/Description	Comments	
Other	N/A	Yes	08/23/2022: Outside conference with John Williams at the Hilton.	Fixed record mismatch.	
Update	PM to OL	Yes	08/23/2022: Outside conference with John Williams at the Hilton.	Start Changed From: 07/13/2022 11:30 AM Changed To: 08/03/2022 11:30 AM End Changed From: 07/13/2022 01:00 PM Changed To: 08/03/2022 01:00 PM	
Update	PM to OL	Yes	Simpson/Judy	Title Changed From: Changed To: Miss Simpson Birthday Changed From: 8/1/1978 Changed To: 08/11/1978	
Update	PM to OL	Yes	Olson/Gary J.	Title Changed From: Changed To: Mr. Olson Birthday Changed From: 3/4/1975 Changed To: 03/09/1975	
Update	PM to OL	Yes	Carter/Julie	Title Changed From: Changed To: Ms. Carter	
Update	PM to OL	Yes	Larson/Michael	Title Changed From: Changed To: Mr. Larson Birthday Changed From: 5/20/1978 Changed To: 05/25/1978	

Report Writer Name *SYNCRPT*

The Outlook Synchronization Report is a Report Writer report included with PracticeMaster and can be modified as desired. This report provides a simplified version of the Outlook Sync Log and can be generated for a range of users/groups by name. Users and Groups are listed alphabetically with each user or group printing on a separate page. You can optionally include or exclude items that were successfully synced.

Outlook Synchronization Settings Report

Date: 08/23/2022

Outlook Synchronization Settings Report

User: CATHY Cathleen Trudore

Page: 1

Calendar Integration Settings

PracticeMaster to Outlook	Automatic
Outlook to PracticeMaster	Automatic
Allow Deletions in PracticeMaster	No
Synchronize Events	Yes
Outlook Events Folder	Outlook\Top of Personal Folders\Calendar\Cathy's PracticeMaster Synced Items
Synchronize Tasks	Yes
Outlook Tasks Folder	Outlook\Top of Personal Folders\Tasks\Cathy's Tasks
Include Tasks with no Due Date	Yes
Include Completed Tasks	Yes
Customize Outlook Subject	Desc, Client_ID, Client_Name
Customize Outlook Description	Client_Desc, Comments
Date Range	Past 2 Weeks, Future 12 Months

Contact Integration Settings

PracticeMaster to Outlook	Automatic
Outlook to PracticeMaster	Disabled
Allow changes to billing contacts	No
Include private Outlook contacts	No
Contact Folder	Outlook\Top of Personal Folders\Contacts\Cathy's Contacts
Contact Field Mapping	

Outlook

Title
 FirstName
 MiddleName
 LastName
 Suffix
 CompanyName
 Department
 JobTitle
 Profession
 BusinessAddressStreet
 BusinessAddressPostOfficeBox
 BusinessAddressCity
 BusinessAddressState
 BusinessAddressPostalCode
 BusinessAddressCountry
 BusinessTelephoneNumber
 HomeAddressStreet
 HomeAddressPostOfficeBox
 HomeAddressCity
 HomeAddressState
 HomeAddressPostalCode
 HomeAddressCountry
 OtherAddressStreet
 OtherAddressPostOfficeBox
 OtherAddressCity
 OtherAddressState
 OtherAddressPostalCode
 OtherAddressCountry
 MobileTelephoneNumber
 HomeTelephoneNumber
 BusinessFaxNumber
 Email1Address
 Body
 User1
 User2
 WebPage
 MailingAddressStreet
 MailingAddressPostOfficeBox
 MailingAddressCity
 MailingAddressState
 MailingAddressPostalCode

PracticeMaster

Salutation
 First_Name

 Last_Name

 Organization

 Specialty
 Addr1_Line1,Addr1_Line2,Addr1_Line3

 Addr1_City
 Addr1_State
 Addr1_Zip
 Addr1_Country
 Work_Phone
 Addr2_Line1,Addr2_Line2,Addr2_Line3

 Addr2_City
 Addr2_State
 Addr2_Zip
 Addr2_Country
 Addr3_Line1,Addr3_Line2,Addr3_Line3

 Addr3_City
 Addr3_State
 Addr3_Zip
 Addr3_Country
 Cellular_Phone
 Home_Phone
 Work_Fax
 Email_Address1
 Comments
 Contact_1
 Contact_2
 Web_Page

Outlook Synchronization Settings Report

User: CATHY Cathleen Trudore

Contact Field Mapping

<u>Outlook</u>	<u>PracticeMaster</u>
MailingAddressCountry	
AssistantTelephoneNumber	Assistant_Phone
Business2TelephoneNumber	Work_Phone2
CallbackTelephoneNumber	Callback
CarTelephoneNumber	Car_Phone
CompanyMainTelephoneNumber	Company_Phone
Home2TelephoneNumber	Home_Phone2
OtherTelephoneNumber	Other_Phone
PrimaryTelephoneNumber	Primary_Phone
RadioTelephoneNumber	Radio_Phone
TTYTDDTelephoneNumber	TTY_TDD_Phone
HomeFaxNumber	Home_Fax
OtherFaxNumber	Other_Fax
ISDNNumber	ISDN
PagerNumber	Pager
TelexNumber	Telex
Email1DisplayName	
Email2Address	Email_Address2
Email2DisplayName	
Email3Address	Email_Address3
Email3DisplayName	
Account	
AssistantName	
BillingInformation	
Children	
GovernmentIDNumber	
Hobby	
InternetFreeBusyAddress	
Language	
ManagerName	
Mileage	
OfficeLocation	
OrganizationalIDNumber	
ReferredBy	
Spouse	
User3	
User4	
BirthDay	DOB
Anniversary	
Companies	
ComputerNetworkName	
CustomerID	
FTPSite	
NickName	
Subject	
PersonalHomePage	
SelectedMailingAddress	

Contact Category Mapping

<u>Outlook</u>	<u>PracticeMaster</u>
Mapping has not been initialized for this account	

User Filter	CATHY
Exclude contacts with no users defined	No
Category Filter	No
Exclude contacts with no category defined	No
Custom Filter	No

Synchronization Options

Periodic Sync Interval	30 Minutes
Require Confirmation	1 Record
Manually sync these users	CATHY

Report Writer Name [Maintenance](#) | [Integration](#) | [Outlook Synchronization](#) | [Synchronization Options](#) | [Print Report](#)

The Outlook Synchronization Settings Report is a report that displays the values for all of the settings for the current user, or all PracticeMaster users who are configured to integrate with Outlook. You can optionally include Microsoft Exchange integration settings from System Configuration on the report.

Note: When running the report for all users, values for the **Outlook Events Folder**, **Outlook Tasks Folder**, and **Contact Folder** will only be shown for the user running the report. A value of "unavailable" will be shown for all other users included on the report.

WorkFlow List

Date: 08/23/2022	WorkFlow List				Page: 1
Jensen, Martin & Anderson, P.C.					
WorkFlows for File:	CMCAL				
WorkFlow Name	File	Inactive	Prompt	User Activated	
Promo - Add Calendar Convert this calendar entry to a fee?	CMCAL	No	No	No	
Automate your next step - whether it's converting to fee, updating a client, or adding a task. Just create a PracticeMaster WorkFlow.					
Sample - Start Document Assembly on Task Complete This WorkFlow starts Word Document Assembly using the CMSYSTEM\DOCS\Client Letter.dot template whenever a task is marked complete.	CMCAL	Yes	Yes	No	
WorkFlows for File:	CMCLIENT				
WorkFlow Name	File	Inactive	Prompt	User Activated	
Email ADMIN on Critical Field Changes This WorkFlow starts an Email to ADMIN@YourFirmName.com whenever the name, work description, or location fields change.	CMCLIENT	No	Yes	No	
Start Client Letter Start Word Document Assembly with Client Letter	CMCLIENT	No	No	Yes	
Statute of Limitations Entry & Reminders When a Statute of Limitations date is entered, this WorkFlow will automatically create 4 Calendar Entries to remind you of the SOL expiration, with alarms. The dates are: Day of SOL, 1 Month prior, 3 months prior, 6 months prior. The 3 months prior reminder will stay on the screen, but all dates are entered.	CMCLIENT	No	No	No	
WorkFlows for File:	CMDOCM				
WorkFlow Name	File	Inactive	Prompt	User Activated	
Sample - Manage Document This WorkFlow selects the "Automatically Manage Documents" option which allows PracticeMaster to manage document folder and file names.	CMDOCM	Yes	No	Yes	
Selecting this option will automatically rename the document according to the naming conventions specified in Customization, and note the original document name in the record comments.					

Report Writer Name **WORKFLOW**

The WorkFlow List is a Report Writer report included with PracticeMaster and can be modified as desired. This report can be generated for a range of WorkFlows by name. WorkFlows are sorted by File Name and listed alphabetically. Each WorkFlow's Name, File, Inactive Status, Prompt Status, User Activated Status, and message content is included.

Client File Usage Reports for Contacts

The following two Usage Reports can be used to show all contacts that are associated with a client. The Client ID is shown in the report title. When a report is displayed using the Preview option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Contact Usage Report

Menu [File](#) | [Open](#) | [Client](#) | [Edit](#) | [Report](#) | [Contact Usage](#)

Contact	File	Field Name
Farmer's Mutual Health & Life Ins	Claimant Information	Insurance Company Name
Harris/Mary	Claimant Information	Agent's Name
Henrey/William	Document Management	Contact
Henrey/William	Document Management	Contact
Labour Plating Company	Document Management	Contact
Larson/Michael	Client	Client Name
Larson/Michael	Client	Contact Name
Larson/Michael	Document Management	Contact
Lewis/Joseph M.	Client	Opposing Attorney
Lewis/Joseph M.	Related Contacts	Contact
Lincoln Aesthetic & Reconstructive Surgery LLC	Medical Services	Name of Medical Provider
Medical Arts Associates	Document Management	Contact
Medical Arts Associates	Document Management	Contact
Medical Arts Associates	Medical Services	Name of Medical Provider
National Burn Care Center	Document Management	Contact
National Burn Care Center	Document Management	Contact
National Burn Care Center	Medical Services	Name of Medical Provider
National Security Life Insurance	Employer's Insurance	Employer's Insurance Co.
Nebraska Workers' Compensation Court	Client	Court of Jurisdiction
Olsen/Douglas A.	Client	Judge
Olson/Gary J.	Claimant Information	Adjuster's Name
Roberts/Linda M.	Client	Referred By
Roberts/Linda M.	Document Management	Contact

Date: 08/23/2022 Page: 1

Contact Usage for Client 100.00
Jensen, Martin & Anderson, P.C.

Show Duplicates: Yes

Total records found: 23

Contact Usage Report (No Duplicates)

Menu [File](#) | [Open](#) | [Client](#) | [Edit](#) | [Report](#) | [Contact Usage \(No Duplicates\)](#)

Contact	File	Field Name
Farmer's Mutual Health & Life Ins	Claimant Information	Insurance Company Name
Harris/Mary	Claimant Information	Agent's Name
Henrey/William	Document Management	Contact
Labour Plating Company	Document Management	Contact
Larson/Michael	Client	Client Name
Lewis/Joseph M.	Client	Opposing Attorney
Lincoln Aesthetic & Reconstructive Surgery LLC	Medical Services	Name of Medical Provider
Medical Arts Associates	Document Management	Contact
National Burn Care Center	Document Management	Contact
National Security Life Insurance	Employer's Insurance	Employer's Insurance Co.
Nebraska Workers' Compensation Court	Client	Court of Jurisdiction
Olsen/Douglas A.	Client	Judge
Olson/Gary J.	Claimant Information	Adjuster's Name
Roberts/Linda M.	Client	Referred By

Date: 08/23/2022 Page: 1

Contact Usage for Client 100.00
Jensen, Martin & Anderson, P.C.

Show Duplicates: No

Total records found: 14

Contact File Usage Reports

The following three Usage Reports can be used to show where a specific contact is used in Tabs3 Software. When a report is displayed using the Preview option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Contact Usage Report

Menu [File](#) | [Open](#) | [Contact](#) | [Edit](#) | [Report](#) | [Contact Usage](#)

Date: 08/23/2022		Contact Usage Report Jensen, Martin & Anderson, P.C.			Page: 1
File(s) Searched:	All Files				
Contact ID:	White/Kelly				
File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Calendar	Contact	850.00	White/Kelly	Divorce	Confirm date of evaluation(s).
Calendar	Contact	850.00	White/Kelly	Divorce	Evaluations to Court in 5 days.
Calendar	Contact	850.00	White/Kelly	Divorce	Hearing
Client	Client Name	850.00	White/Kelly	Divorce	
Client	Contact Name	850.00	White/Kelly	Divorce	
Document Managem	Contact	850.00	White/Kelly	Divorce	
Document Managem	Contact	850.00	White/Kelly	Divorce	
Client	Client Name	850.01	White/Kelly	Last Will & Testament	
Client	Contact Name	850.01	White/Kelly	Last Will & Testament	
Client	Client Name	850.02	White/Kelly	Medical Care of Brianne	
Client	Contact Name	850.02	White/Kelly	Medical Care of Brianne	
Total records found: 11					

Calendar Contact Usage Report

Menu [File](#) | [Open](#) | [Contact](#) | [Edit](#) | [Report](#) | [Calendar Contact Usage](#)

Date: 08/23/2022		Contact Usage Report Jensen, Martin & Anderson, P.C.			Page: 1
File(s) Searched:	Calendar File				
Contact ID:	Klein/Daniel P.				
File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Open Workers' Comp Case
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claim filed with W/C Court?
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Fee Agreement signed & sent to W/
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Gather/update medical records.
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Letter to client re: procedures & rele
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Has employer been notified?
Calendar	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Claims Adjuster appointed & contact
Total records found: 7					

Journal Contact Usage Report

Menu [File](#) | [Open](#) | [Contact](#) | [Edit](#) | [Report](#) | [Journal Contact Usage](#)

Date: 08/23/2022		Contact Usage Report Jensen, Martin & Anderson, P.C.			Page: 1
File(s) Searched:	Journal File				
Contact ID:	Klein/Daniel P.				
File	Field	Client ID	Client Name	Client Desc	Calendar/Journal Desc
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	08/19/2022 09:45a KIM
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Contact Atty Nelson re: culpability fo
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	scaffolding information
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Conversation with client regarding u
Journal	Contact	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	Researched possible scenarios that
Total records found: 5					

Lookup File Usage Reports

The following Usage Reports can be used to show where specific lookup records are used in PracticeMaster data files. When a report is displayed using the Preview option, you can mouse over individual records and with a click of the mouse immediately drill down to the field and individual record. These reports cannot be modified.

Timekeeper Usage Report

Menu [File](#) | [Open](#) | [All Other Files](#) | [Lookup Files](#) | [Billing Files](#) | [Timekeeper](#) | [Edit](#) | [Report](#) | [Usage Report](#)

Date: 08/23/2022		Usage Report				Page: 1
		Jensen, Martin & Anderson, P.C.				
Searched Value:	9					
From File:	Timekeeper					
File	AOP	Field	Client ID	Client Name	Client Desc	
Client	System Files	Orig_Tkpr	121.01	Phillips/Marcus	Real Estate Acquisition	
Client	System Files	Sec_Tkpr	300.00	McBride/John	Management of Estate Trust	
Fee	System Files	Timekeeper	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Timekeeper	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Total records found: 13						

Transaction Code Usage Report

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		Jensen, Martin & Anderson, P.C.				
Searched Value:	2					
From File:	Transaction Code					
File	AOP	Field	Client ID	Client Name	Client Desc	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Fee	System Files	Tcode	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Total records found: 7						

Task Code Usage Report

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Searched Value:	A103					
From File:	Task Code					
File	AOP	Field	Client ID	Client Name	Client Desc	
Fee	System Files	Activity	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Activity	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Activity	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Activity	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Activity	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Activity	200.01	Peterson Insurance Co.	General Legal Counsel	
Fee	System Files	Activity	200.02	Peterson Insurance Co.	Maintenance of Insurance Policies	
Total records found: 7						

Location Usage Report

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Searched Value:	LA					
From File:	Location					
File	AOP	Field	Client ID	Client Name	Client Desc	
Client	System Files	Location	102.00	Gilbert/Andrew C.	Auto Accident	
Client	System Files	Location	120.01	Klein/Daniel P.	Klein vs. Simmons Construction	
Client	System Files	Location	121.01	Phillips/Marcus	Real Estate Acquisition	
Client	System Files	Location	415.00	MegaConstruction Corporation	Corporate Merger - Megabuilders and BuilderCorp	
Client	System Files	Location	850.00	White/Kelly	Divorce	
Client	System Files	Location	850.01	White/Kelly	Last Will & Testament	
Client	System Files	Location	850.02	White/Kelly	Medical Care of Brianne	
Total records found: 7						

Calendar Code Usage Report

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Searched Value:	OutCW				
From File:	Calendar Code				
File	AOP	Field	Client ID	Client Name	Client Desc
Calendar	System Files	Calendar_Code		Client not found in client file	
Calendar	System Files	Calendar_Code	101.00	Williams/John	State v. Williams
Calendar	System Files	Calendar_Code	101.00	Williams/John	State v. Williams
Calendar	System Files	Calendar_Code	102.00	Gilbert/Andrew C.	Auto Accident
Calendar	System Files	Calendar_Code	121.01	Phillips/Marcus	Real Estate Acquisition
Calendar	System Files	Calendar_Code	200.01	Peterson Insurance Co.	General Legal Counsel
Calendar	System Files	Calendar_Code	200.02	Peterson Insurance Co.	Maintenance of Insurance Policies
Calendar	System Files	Calendar_Code	200.02	Peterson Insurance Co.	Maintenance of Insurance Policies
Total records found: 8					

Category Usage Report

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Searched Value:	10				
From File:	Category				
File	AOP	Field	Client ID	Client Name	Client Desc
Client	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Client	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	100.00	Larson/Michael	Larson v. Bel-Cor
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Fee	System Files	Category	120.01	Klein/Daniel P.	Klein vs. Simmons Construction
Total records found: 22					

Multi-Record Processing Log

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User: DAN Time: 10:04:35 AM File: CMSYSTEM\CMCAL Replacing Entire Field: No Replacing Marc Phillips with Marcus Phillips		
Replace completed, 2 of 2 replacements made.		
Replaced Field: Description for Record Number: 2463 Appointment with <u>Marc Phillips</u> . Appointment with <u>Marcus Phillips</u> .		
Replaced Field: Description for Record Number: 2417 Outside conference with <u>Marc Phillips</u> . Outside conference with <u>Marcus Phillips</u> .		

This report can be displayed when using the **Replace All** feature of Find and Replace. Included on the report is the User ID of the PracticeMaster user who performed the Replace All and the time at which it was run. The file for which the Replace All was run is listed, followed by whether or not the **Replace Entire Field** option was selected. The text replaced is shown with the text with which it was replaced. A count of replaced records is shown. The replaced fields are then listed along with the original text underlined, and the replacement text underlined. This log file can only be printed while the Find and Replace results are shown. Once the Find and Replace window is closed, the log file is deleted and can no longer be printed.

You can use the Load Record function while in the associated Editor window to retrieve record by specifying the record number.