

**Professional Personal Injury Case Management**

**Installation  
&  
Getting Started  
Guide**

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# PI-Master Installation & Getting Started Guide

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## Types of Help and Support

Today's technology provides the software vendor a variety of methods in which to dispense Help and Support to its users. We have found each method to have its own unique qualities that make it better suited under certain circumstances.

In general we appreciate and acknowledge the fact that most people do not enjoy reading technical manuals. With that in mind, we have decided here at TT&P Corporation to use several of these methodologies that we believe will provide you with the best service. To list just a brief example of these methods:

- **Written Text** - The typical manual with text and illustrations. Used when a verbose or conversational approach to a subject is needed.
- **Images with Callouts** – Basically screenshots from the working program with “Balloon” type “short descriptions”. Used when the subject can be quickly understood when a picture of the item is shown with a brief annotation.
- **Running Videos** - This type of help is gaining greater and greater acceptance as people realize that seeing a moving video image of a complicated process best conveys an understanding because it “mimics” real life situations that people can relate to.
- **Online Help** – Software companies are well aware of the advantages that providing online help can offer. For one thing, if everyone goes to the same place to receive help on the varied subjects, the vendor can update that source of help in one location and everyone from that point on is receiving the latest and greatest information about the selected subject. We plan to provide you help online using some form of the three methods listed above.
- **Email Support** - Not everything you will need will be in a help file. Under those circumstances you email us with your question. Our email address is  
[pi-master@lexcelsys.com](mailto:pi-master@lexcelsys.com)
- **Telephone Support** – You may also call us to receive answers to your questions and a certain amount of support is provided to each office and we simply request that you do not attempt to abuse it. Extended support to offices that tend to ask for a inordinate amount of support will be assessed separate support fees. Currently that number is (323) 292-0235.

Since access to most of our help will be provided via the Internet, you will need to have a working connection to the web. Almost everyone nowadays has access to the Internet but if you work in an office where your “specific workstation” is not connected, you may need to temporarily ask a co-worker if you may borrow their terminal in order for you to look up a solution.

Throughout PI-Master you will find a small icon that will lead you to help concerning some important issue on the current page. Click on it and you will receive Online Help. The icon appears as below:



= Help

We wish the best of luck with our software. We trust that you will find it to be a hardworking and reliable partner in your personal injury practice.

## **WELCOME TO PI-MASTER**

Thank you for selecting PI-Master to assist you in your Personal Injury Law Practice. We feel confident that you have subscribed to the finest program available for managing your personal injury case load. We also feel confident that you and your office will be enjoying the benefits of such a system in a very short period of time.

This manual will help guide you through the installation of the system and provide useful information on how you may want to organize your files in order to get the most out of them. Each office is different and management styles vary greatly. However PI-Master is very flexible and allows your office to function primarily in the same way it always has with the added benefit of increased efficiency and being able to handle more cases with less personnel.

This manual does not attempt to teach you Personal Injury. The makers of the product assume that you already know how to do that. It does however show you how to use the program in your business. The program is written for the Windows Operating System. It will work under Windows XP or higher.

If you are already familiar with Windows programs you will immediately see many of the similarities that such programs possess. Where possible, many standard Windows conventions are maintained. However, if forced by certain technical considerations the program may vary slightly to maintain the integrity of your valuable data. It will, in a short time, feel very natural to the regular user.

### ***How Long Will It Take Me To Learn It?***

That's a good question and deserves an honest answer. It should take a person that is use to working on computers and has some experience with Windows programs about 1-2 days to learn the basics of the system. Actually we have found that the real determination of the learning curve is in how much experience the person has in PI .

The program is extremely easy to use. The most difficult part ( if you can say that ) is simply finding out where you do certain things in this program that you use to do manually or in another program.

You can think of it in a similar way as being introduced to a new school campus and you find yourself looking for the location of buildings you'll be attending class in. After you've done it once or twice, the process is very simple. In fact it will become so natural that you will not even think about it.

PI-Master will perform some activities normally requiring special attention if you do not already have a system designed for PI. For example, the program will calculate your Statute Dates for you. There's no way for it NOT to calculate it for you. All you have to know is the Accident Date. In addition for example (in California), if the case turns out to be a **Government Entity** case ( i.e. School Bus ), the program will automatically recalculate the Statute according to the Date of the **Letter Of Rejection**.

The system allows multiple clients (i.e. Passengers) to “grab” information from the Driver, thus alleviating the need to enter Defendant Information more than once. At any time you can press one button and update a passenger's file with all the latest changes made to the primary client's file.

PI-Master allows the printing of Form Letters that merges data from the data entry screens into letters that we supply with the program as well as custom letters you'll want to create on your own. You'll be able to create literally hundreds of custom form letters.

These are just a few references to some of the program's features. You'll be learning about more while going through this manual and working with the product.

This documentation will be written with **brevity** in mind. We realize most people don't like reading technical manuals and even fewer ever get around to doing it. Therefore, we're going to make a special effort to **Get To** and **Keep To the Point**. Maybe then we'll have a better chance of getting you to read some very valuable and useful information contained within it.

**Please note that this documentation is just part of the full documentation for the product. We shall be providing additional support by our Online Help System.**

Online support is the trend in today's software distribution. It has certain advantages for both the user and developer of the software. Primarily, the latest news, issues, bug reports and solutions can be handled best while accessing the web. Since the developer can immediately upload “helpful tips” to a central location, everyone who needs it will be reading from the “same” book.

The next few pages deal with the installation of the product. Please read the directions carefully. A proper installation is the key to eliminating any unnecessary frustrations that sometimes occurs when introducing yourself to new technology.

Again we thank you and wish you the Best Of Luck!

## SOFTWARE INSTALLATION

It is assumed that PI-Master is going to be installed on a Networked Computer System. Although it will work fine on a stand alone system, we have found the true benefit is derived by having the data available to multiple people at the same time. Therefore these instructions will assume the more difficult of the two scenarios. If your system is a stand alone one, the additional and unneeded instructions here will become very obvious.

Although we feel that anyone mildly acquainted with computers could install this product we realize that most of you will feel more comfortable if you have your computer consultant or in-house computer guru do it for you. These people generally have no problem peeking under the hood of such technical products. If you have access to such a person, we recommend that you get them involved at this early stage.

In any event, the following information will be useful regardless of your skill level.

### ***System Requirements*** ---

PI-Master is designed to work on computers that are commonly known to be IBM compatible. These machines must be equipped with and successfully running a Windows compatible network. Each office should know if they indeed have a network. This documentation does not go into the many facets that make up a network. Our needs are very non-restrictive and most computers bought today ( it's 2008 ) have the necessary minimum requirements.

Each work station must have at least 256 megabytes of RAM and a video system capable of displaying images presented in color. 512 megabytes may be required as a minimum on some machines that are sharing resources with multiple programs etc. The rule of thumb is, the more memory the better.

PI-Master should be able to run on systems with a dedicated server or on peer to peer networks. However we highly recommend that on a peer to peer system, the computer acting as the server be treated as a stand alone server.

Although in theory a person should be able to work on this server, we have found it better to allow that particular computer to spend it's computing power handling the network traffic.

When we refer to networks we are talking about a system that allows multiple people to access, enter and retrieve data from a central computer at the same time. We make that distinction here only because of the proliferation of products on the market that pass themselves off as networks when all they can really do is allow you to copy files to and from computers or simply share a common printer. Those products are not true Networks and PI-Master will not work on them as intended.

**PI-Master's executable program is intended to run on the workstation(s) and each workstation will access a "central server" for the common data.**

## **Getting Started** ---

Nine out of ten PI-Master users initially gain access to the program by downloading it from our website at:

[http://pi-master.net/download\\_pi\\_eval.htm](http://pi-master.net/download_pi_eval.htm)

This link will lead you to a file that you will need to download. It's important to note that the SETUP file contained within this link assumes you are setting up the program to a "virgin" computer where PI-Master "DOES NOT" already exist. **Updates for pre-existing PI-Master installations is not done in this manner.**

**Note:** One harmful situation you must avoid is installing the program a second time if you have already started inputting data. Since the database file names are the same, a second installation will overwrite your existing data files.

The setup file name is: **pi-master-4-windows-setup.exe**

Save this file to your local computer.

This file is an executable file and it contains a compressed version of ALL the files needed to successfully install and operate an actual version of the product. When initially installed, it allows a user to run the program in "evaluation mode", sometimes referred to as a "Trial". In this mode, the only limitation is, the user will only be able to enter a maximum total of 5 new clients. About 15 clients are already entered to let you see how data might appear in the real product.

You may have gained access to the file listed above by other means like, on a CD, email etc. The results should be the same no matter what the initial delivery system was in use.

As a general rule, exit any Windows programs that you might be running BEFORE you attempt to install a new one. After exiting all other software you should **run the setup file** from the location you previously saved it to (or off a CD if you have one).

on the file name.

This can be done by double clicking  
The following screen should appear...



After clicking the “NEXT” button...



This screen is important because you **MUST** agree with the stated “Terms and Conditions” in order to proceed. If you choose to do so, click “NEXT”.



The following screen informs you where the program will be installed.

**Note that the installation drive and folder is “fixed”**, meaning you can not alter this location. This is done for your protection as well as for our ability to support you. Years of experience has proven to us that when we allow users to pick their own folders, it often causes unforeseen integrity issues which in turn makes it harder for us to help diagnose your problem (if you should one).



Click “NEXT” to continue...



Click “NEXT” to continue...



When the above screen appears, you are done with the installation. This can all be accomplished in less than 3 minutes. You'll be surprised as to how easy it is to install the program.

If all has gone well, you should have a working program installed on you local “C” drive.

Full folder name : **C:\PI-Master-4-Windows**

You should also have a new Icon placed on your desktop that will look like the following:



You'll click on this icon in the future to start the program each day.

### **Single users only:**

The software installation for those using only one computer is nearly complete. The next step for you is to login and follow some configuration activities. You may jump over the next section that deals with Networking (if you wish).

You'll want to go to the [LOGIN: For ALL users](#) section that can be found later in this guide.

## Network users only:

You'll need to complete the above steps for **ALL** workstations. DO NOT simply copy the files to the server and then copy back down to other workstations.

In order for your network to operate properly, all users need to be “looking at” and “operating from” a common database. The program will work just fine when using your local computer but the data that you input will not be accessible to other users on the network.

----- Server Installation ( best performed by your Network Administrator )

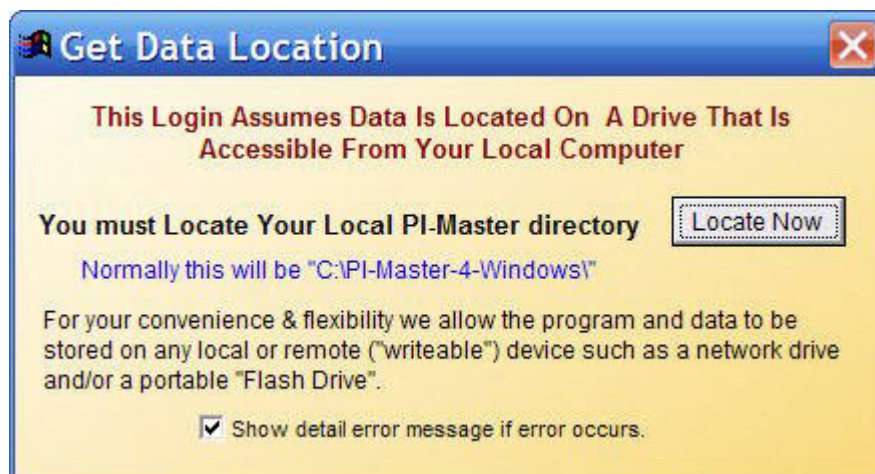
- FYI – You will not be running our software from the “server”
  - The “server” will simply act as the central location for all the data files
  - You'll need to create a folder on the server that will allow access to all the data files from all the workstations. For example - **F:\PI-Master-4-Windows**
  - Use a drive letter designator that will allow network access (i.e. **F, L, M** etc)
  - DO NOT use spaces in a folder name
  - COPY ALL the files from the local machine's **C:\PI-Master-4-Windows** folder UP TO the server's **F:\PI-Master-4-Windows** folder (use proper drive letter of course)
  - At this point, both your C: drive and F: drive have the exact same files
  - You only need to do the above ONCE. In other words, you only need to update the server ONE TIME from one of the workstations. If you mistakenly did this procedure after entering data ( on the server ) you will OVERWRITE all you hard earned data.
- 
- The following will tell you how to “POINT” your computer to the data stored on the “server” machine.
  - To start the program, click on the PI-Master Icon that should be located on your computer's desktop.



- On the first screen that should appear, click on the Image of the HARD DISK in the lower right corner \_\_\_\_\_ of the screen

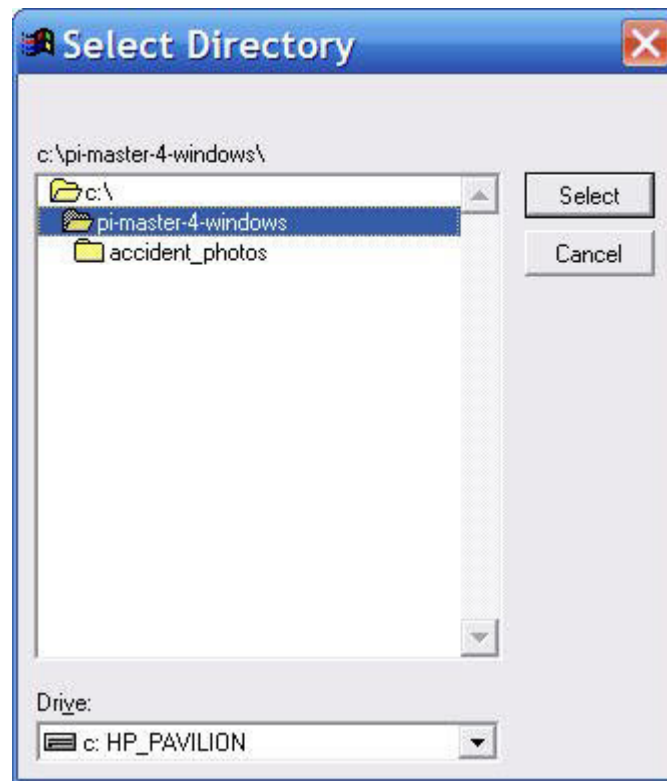


- The following screen should appear



- Click the "Locate Now" button

- This is where you can specify your actual Network Drive and network folder. Such as **f:\pi-master-4-windows**. Our image below only shows the local C: drive but you should get the point. Hi-lite your Network location and click “Select”



- You'll be asked if this will be your default location, click YES



Note: You'll need to do the above **Locate Drive/Folder** steps only once for **each** workstation. If you do not, the program will act as normal, however it will be using the data files from the local machine ( the C: drive ). You want to point to the data on the file server so that others may see the data you've entered and you can see theirs.

## LOGIN: For ALL users, Network and Single User

From this point on, there is really no difference to how the program will operate when considering a Network installation, Single Computer or even Laptop.

All users will be presented with the following login screen once they click on the OpeningScreen.



On a daily basis, you will need to login to the system using YOUR NAME and YOUR PASSWORD. The above image has a typical screen with several sample office workers and the name of the Law Office to which this program is registered.

You don't have to register now but please do so in the near future. It will help to personalize the program with your specific information. The button for this :

### **"Enter Your Office Information"**

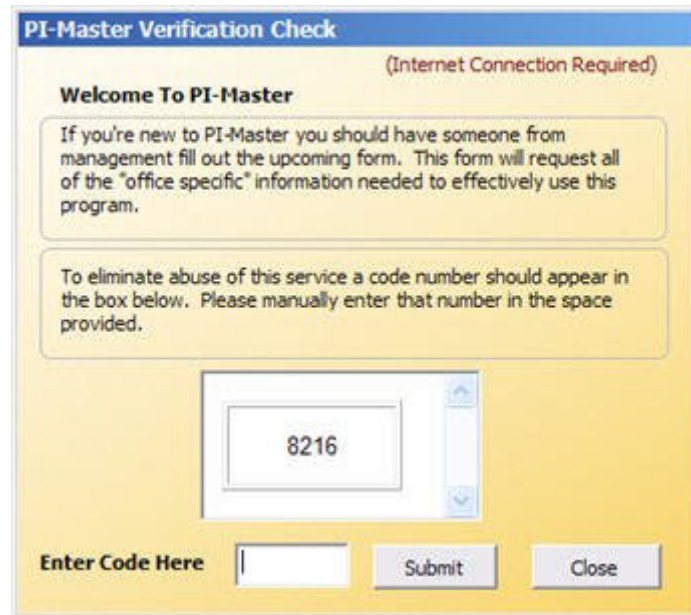
can only be seen when you HAVE NOT YET registered. Once you have entered your name, address etc. this button will not be displayed and you will NOT be able to further modify this data. So be careful when you get around to entering your office information. Make sure it's correct the first time.

If you choose to register now, follow the quick procedures on the next page.



## To Register Your Office

When you click on the “**Enter Your Office Information**” button as described above you’ll be presented with the following pop-up window.

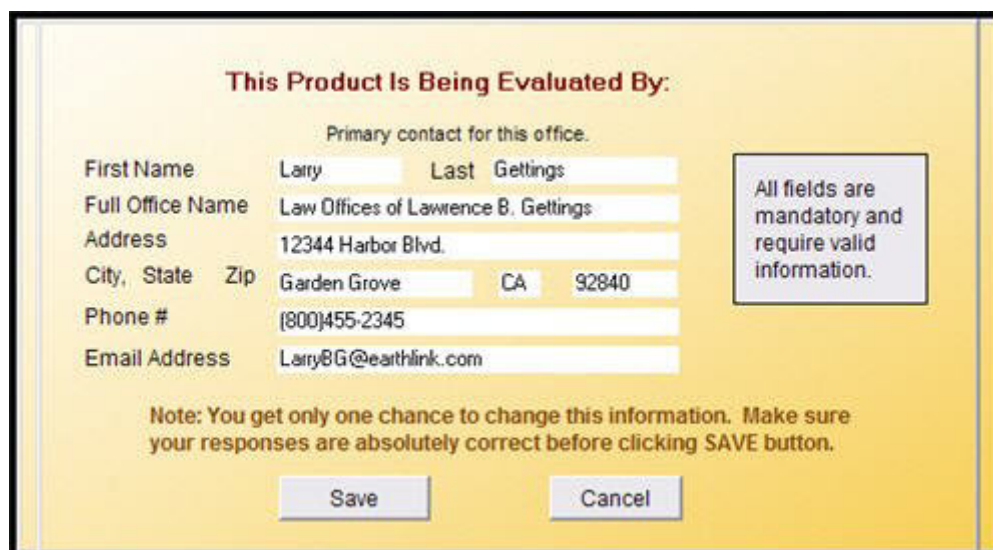


The image shows a pop-up window titled "PI-Master Verification Check" with a blue header bar. Below the title, it says "(Internet Connection Required)". The main content area has a yellow background. It starts with "Welcome To PI-Master". Below this, there are two text boxes. The first says: "If you're new to PI-Master you should have someone from management fill out the upcoming form. This form will request all of the 'office specific' information needed to effectively use this program." The second says: "To eliminate abuse of this service a code number should appear in the box below. Please manually enter that number in the space provided." Below the second text box is a small box containing the number "8216". At the bottom, there is a label "Enter Code Here" followed by a text input field, a "Submit" button, and a "Close" button.

This process requires that the computer that registers your office is connected to the internet. In the new pop-up window should be a randomly generated 3 or 4 digit number. You must re-type that number in the data field area that says:

**Enter Code Here** \_\_\_\_\_

After typing the number, click the **Submit** button to proceed. You’ll be asked if you are sure you want to proceed. Click **Yes**. The following screen will appear.

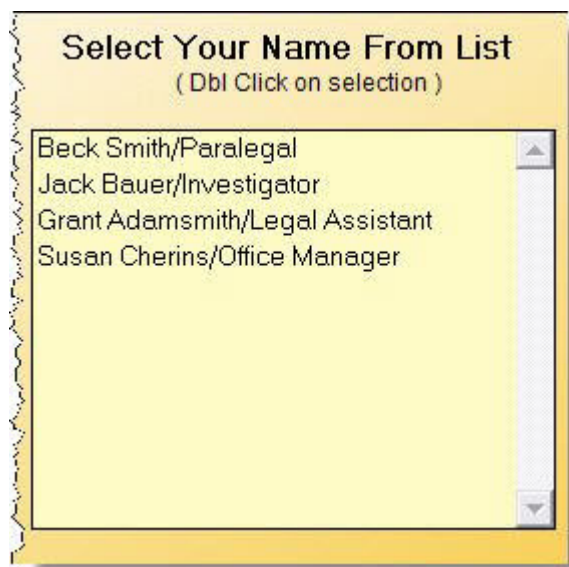


The image shows a form titled "This Product Is Being Evaluated By:". Below the title, it says "Primary contact for this office." The form has several fields: "First Name" (Larry), "Last" (Gettings), "Full Office Name" (Law Offices of Lawrence B. Gettings), "Address" (12344 Harbor Blvd.), "City, State" (Garden Grove, CA), "Zip" (92840), "Phone #" ((800)455-2345), and "Email Address" (LarryBG@earthlink.com). To the right of the form is a box that says "All fields are mandatory and require valid information." At the bottom, there is a note: "Note: You get only one chance to change this information. Make sure your responses are absolutely correct before clicking SAVE button." Below the note are two buttons: "Save" and "Cancel".

Fill in the preceding screen with correct information and then after double checking your entry, click the "**SAVE**" button.

Because you are registering for the first time, the program will have to shut down and you will need to re-start it in the normal fashion. From this point on, the program will know what office you are working from.

When you return to the program, you'll again see the login screen. Your new office information should be seen on the left. Below we want to concentrate only on the right of that screen. This is where you and your co-workers will select your name from the list and sign in.



Right now your name will not be part of the list because it hasn't been entered yet by an office administrator. We will use one of our sample records instead.

Note that names are immediately followed by a slash and then a job description. This methodology will later prove to be useful when printing Form Letters. You should not concern yourself with that distinction at this point.

Select the name: **Jack Bauer** from the list in the window. Double click it. Enter the password: **24hr** in the confirmation box that pops up.

The program will search to see if you have any scheduled tasks to perform on this day, for now you don't have any scheduled tasks, so you can simply click on the **Proceed** button when it appears.

The **MAIN SCREEN** will appear.





We think you'll discover that PI-Master sports an attractive and extremely well designed user interface.

## Things You Should Know Before Entering Data ---

We know you are probably anxious to start inputting data but you should take the time to read the following information which will save you time and energy in the long run.

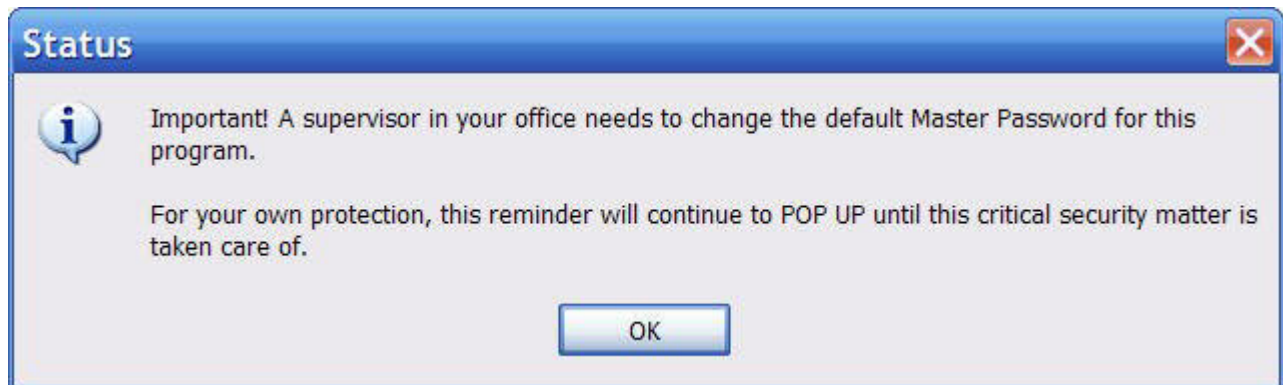
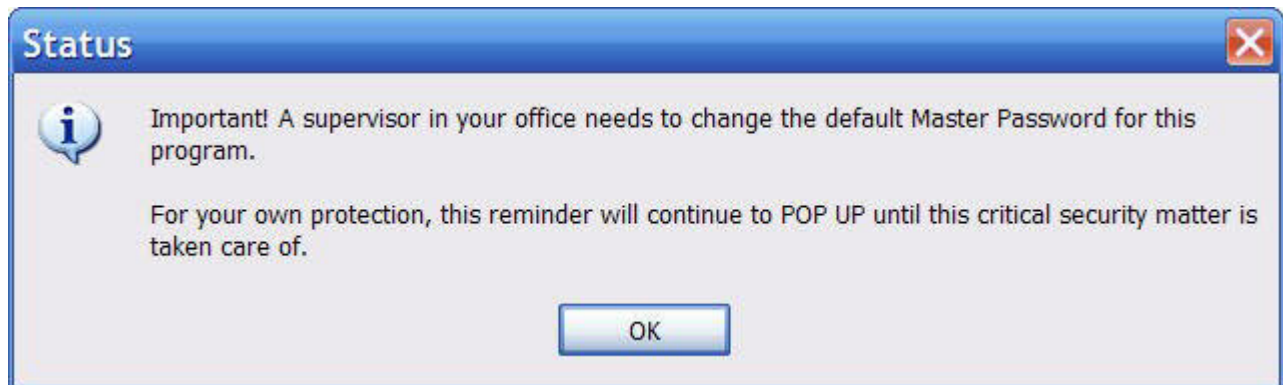
### Password Requirements

\* You and your users will be required to enter a password to enter the system. Make sure you have received that password before attempting to use the software. The purchaser of the product is given a Supervisor's Password that will allow them to assign individual passwords to data entry personnel. This can be done from pull-down menu option **"Utilities"** and under **"Workforce and Passwords"**.

All PI-Master installations initially come with the Supervisor's Password set to **"BOSS"**. Since this is common knowledge it is very important that the Office Manager or Technical "guru" in your office reset that password to something unique.

If you continue to run the software without re-setting this important security feature, the program will systematically remind you to do so. It will display a "NAG" message every 15 minutes or so until you make the change.

Below is a sample of the “NAG” messages that will appear...



You may continue to work while these annoying messages repeatedly appear but we suggest you heed their advice and change “BOSS” to something else.

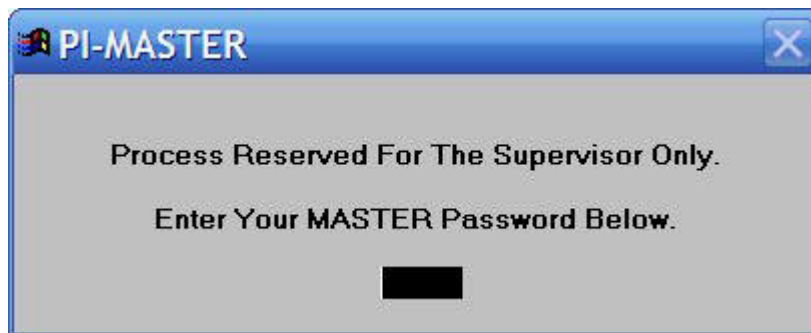
## To Change Supervisor's Password

**Note:** Please make note that the Supervisor's Password is a not the same as the LOGIN passwords. For convenience, a supervisor CAN make his/her LOGIN and SUPERVISOR password the same but they serve two different purposes.

The first step to changing the supervisor's password is to select this option from the dropdown menu choice under **"Utilities"**.



You must know the current Supervisor's Password in order to change it to something else. Once you make a change, **"YOU"** must store that information in a safe place. **"WE"** will not know your changed password. **Use extreme caution.**



Enter "BOSS" into the above sample window (because it will trigger when four characters have been entered). There is no need to hit Enter. The following screen will appear upon correct entry of current password.



Follow instructions on this screen and then select "SAVE" button. Your newly entered **Master/Supervisor** will now be available for use later in the program when required to complete activities that warrant **administrative/management** approval.

---

## Introduction to our Rolodex

\* PI-Master contains a special database file called **ROLODEX**. This file will contain addresses of a number of different people/places that you will use while inputting data. For example, you probably have an extensive list of doctors that you refer your clients to. If you enter those doctors into the ROLODEX FIRST, you can access those doctors quickly while entering a new client's data. In fact you can simply browse the Rolodex file and select the doctor and the program will copy the doctor's address & phone information into the client's file.

Another example : Many of your clients are employed by the same company.

Another example: Many of your client's accidents fall under the control of one or more common police departments.

In all of these cases you know from experience that your workday will include the typing of repeated information. Save yourself the time and effort by entering that reusable data into

our Rolodex. One click of the mouse can then equal hundreds of characters of typed data entry.

---

## Best Way To Enter Data

\* You must decide ahead of time how your clients will be entered into the system. We strongly suggest that you enter data in the fields in Proper Upper and Lower Case configurations. You'll be happier if you train yourself and your office personnel to do this.

For example, let's take the name **Mike Parker**. You could enter him as **Mike Parker** or **MIKE PARKER** ( note the capitalization ).

If you have a form letter designed to pick up the name, it may appear kind of unusual to see the letter printed in this form:

Dear MIKE PARKER,

versus:

Dear Mike Parker,

Can you see the difference? The first choice appears like a "mass mailed form letter" while the second choice is somewhat more professional and pleasing to the eye.

Obviously the choice is yours. Our attempt here is simply to make you aware of this consideration ahead of time.

---

\* You must also decide ahead of time if you have all the required information about a client before attempting to enter them into the system. This requirement is quite minimal yet must be followed religiously. The required data is:

- Client's First and Last Name
- Client Case Number ( System will assign a suggested case number that can be changed )
- Accident Date
- Is this case a Government Entity case? ( can effect statute in some states )
- Does client speak English? ( Yes or No )
- Date of Interview ( Date when person became your client )
- Who took initial Interview information?

The above data is needed to make sure that you have at least enough information to follow up with later when that data becomes available. As you can see, the program does not require you to have an extensive amount of data when you first open the file.



## Entering A New Case : The Basics

The next few pages will introduce you to entering a new case into the system. While doing so you'll learn some valuable information about some of the subtleties of how this program works and how to make the best use out of it.

### Navigating the Main Screen

The screenshot shows the PI-Master software interface. At the top is a menu bar with options: File, Edit, Money Matters, Reports, Utilities, Telephone, Form Letters, and About. Below the menu bar is a toolbar with buttons for Sample Data, Bookmark Client, and Find a client. The main area is divided into four tabs: PI CASES, Client Info, Defendant Info, and Witness Info. The PI CASES tab is active, showing a grid of 16 tabs numbered 1 to 16. Tab 2 is selected. Below the tabs is a form for Client Personal Information. The form includes fields for Client Last Name (Arrons), Client First Name (Nick), Client Mid Name, Mr/Ms/Mrs, Address, City, State, Zip, Case Number (96-0109), Accident Date (05/19/2007), Soc Sec #, Home Phone, Phone # 2, Driver's License, Date Of Birth (10/22/1963), Marital Status, Interview Date (05/25/2007), and Interviewed By (Harry). There are also checkboxes for 'Is This A Gov't Claim Case (Y/N)' and 'Does Client Speak English (Y/N)'. On the right side of the form are buttons for Prev. Client, Add New Client, Save, Cancel, and Next Client. A status bar at the bottom shows 'Auto [F1, exec(Auto)]', 'Record 15', and 'Record Unlocked'.

The series of buttons displayed above allow you to jump directly to a TAB that contains the data displayed on the button's label.

The three main tabs:  
Client Info  
Defendant Info  
Witness Info

When clicked the appropriate sub group of data is available.

Tabs 1-16 comprise the pages of data that is used for your primary client.

Above buttons move you to Previous client, or Next client alphabetically by last name.

Other buttons Add New Client and Saves Data.

Review this screen thoroughly. It will save you time later. In fact, we suggest you **spend some time on many of these items before you attempt to start adding new data.**

[Click here](#) to view self running video on page navigation. Internet connection required.

When you're ready to ADD a new client, click the **"Add New Client"** button located on the right side of the screen. The following will appear.

This pop-up screen is asking you to enter the code you see in the little window. In this case that code is "1657". This is a randomly generated number that is required when entering a new case. It is needed only for each "daily session" you have, not for each individual newly added record. Therefore you could add 5 new clients (for example) and yet enter this code only once. Once you exit the program or leave the program idle for too long a period of time, you will again be asked to enter this security code. An Internet connection is required to add new clients. This process checks to see if you are a legitimate user and are qualified to add new clients. Click "Submit" button when ready.

You are now in ADD MODE. Note the **REQUIRED** entries you must make in order to proceed. These fields were talked about earlier (page 22). In general, PI-Master will display the "SAVE" button with a **RED** background when it senses that data has been added or changed.

## Saving Data

Almost all other functionality of the program is halted until you either fill in the proper information and then SAVE or you elect to CANCEL the transaction. There are many TABS of data to be filled out however we will not attempt to explain them all here. There should be little need to do so since most fields of data are self explanatory and all you have to do is enter the data.

## Cancel button – how to abort changes

The “CANCEL” will abort any of your latest changes. If Cancel is use when adding a new record ( ie. Client ) , then the new client will not be added. This assumes you have not already used the “SAVE” button.

Throughout the management of a case, you will be making numerous updates to a client's records. Sometimes you will make a mistaken entry. If you click the “Cancel” button at this point, you'll find your data will revert back to the state it was in before your latest “typo”. In this situation, “Cancel” will not eliminate the entire record.

## Calendar Icon

You may note that on fields that expect Date input, there is generally a **Calendar** icon that will pop-up a mini calendar when clicked. We think you'll find it easier to use this pop-up calendar then to type in the correct date manually. However, the choice is yours.

## Case Number

The **Case Number** field is pre-calculated for you but it may be immediately changed if you have a better or more useful system of keeping track of cases by Case Number. Our method of creating the case number is to take the 2 digit year (ie. 08 of 2008) and add a dash and then use 1000 as the base number and then add “one” to the largest case number in the system already. Therefore in the preceeding screendump (image), the case number: “08-1016” represents the 16<sup>th</sup> case added in the year 2008.

PI-Master has a lot of history and some of the things it does are designed to protect you from yourself. It should meet 99% of your service needs but no two offices are exactly the same.

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you realize are quite unique from the norm.

## Notes / Comments

Each data field is constructed to hold the data that it is requesting. Unusual information and/or comments should use the **Notes/Comments** field that is located on TAB 11. This special field is “free form” and you can just type a note into it in a similar manner you might use your word processor.



## **Tabs**

Use the numerous TABS to navigate to other pages of data entry. In a short time you will become familiar with the types of data that can be input and the location of those data entry screens.

## **Keyboard / Mouse Navigation**

Windows offers you a variety of ways to move around in a program. This gives you added flexibility to work the way you want but it also unavoidably adds to the confusion as to which method is better.

Suffice it to say that there is NO ONE BEST WAY. Some people like using a mouse for navigation and others hate it. We think that maybe the truest answer lies somewhere in between the two. In any event, this section is here to explain some of the pitfalls and advantages to using both methods.

First, we think you need to get familiar with your TAB KEY. If you come from the DOS world you may have rarely used this key. In the Windows world, it moves you from one field to another. For example, to move from the City field to the State field you can press the TAB KEY. To move backwards from State to City, hold down your Shift Key and press Tab.

There are some other keys that will do the same thing, however those keys can sometimes get you in trouble. For example, the ENTER KEY will also advance you from one field to another however if you are not in an actual field you may be triggering some other event to take place.

The word here is to simply use caution. Do a little experimentation and don't get alarmed if you do not get the action you were expecting. The program is probably doing exactly what it is supposed to do, however, you may have something else in mind at the time.

## ***Entering a Primary Client vs. Passenger***

This particular subject is one that is often found confusing by new users of PI-Master. The bottom line is this:

**“You enter a Passenger into the system the same way you would enter a primary client (e.g. Driver)”**

Note: A Passenger is just another client. A passenger needs all the data entered into their file the same way a driver would.

Note 2: Your office could get a case that involves a passenger in an accident but the driver in that accident chooses to go to another law office.

If you have a case where your office will represent a driver **as well as** one or more of the passengers in that same accident, there are some special caveats to consider.

- You should enter as much as you can about the “Driver” first.
- Existing data in the Driver’s file can be used to copy into Passenger’s file.

Think about it for a moment. The accident facts, date and consequences are pretty much exactly the same regardless who was the primary client. By this we mean, the Defendant’s name, insurance, car make and model etc. will be the same no matter whose file we look at concerning this case. Therefore we have a feature that allows you to copy that critical information from the driver to the passenger whenever you feel you have enough information.

This is done by simply going to **Tab 7 or Tab 8** of the **CLIENT INFO TAB**, or to **Tab 1** of the **Defendant’s Tab**.

You’ll see a framed area (on the data input screen) that appears as below:



If you have designated this client as a passenger, then the button above that says “**Click here to update**” would be available. If this button is available and you click on it, you would be able to select the Driver of this case from your pre-existing list of clients and all the pertinent data from that driver will be copied to your currently selected passenger. This can all occur in a matter of seconds and can save you tons of data entry.

Note that this can be done at anytime you wish. However if you alter the **copied data** in anyway, your’ alterations will be lost once you select this option a subsequent time. Another related condition is this. If you later find yourself entering additional “related” data into the primary client’s file, it will NOT automatically update that information into the passenger’s file.

You may wonder why this exchange of information is not a true “two way street”, well the answer is, there may be times when the normal rules need to be broken and we would rather leave that decision up to the *human beings* using the system rather than force our will upon you from a pure programmatic point of view. We can guarantee you that you will run into a case where you’ll want the luxury of being able to have the data entry input independent of a client file that normally would seem to be connected.

The rule of thumb is:

- Enter as much of the driver’s info as possible and as often as possible.
- Use the Update Passenger button as often as needed \_\_\_\_\_ or anytime you suspect that related changes have been made to driver’s file.
- If unique info should remain in the passenger file, stop using the Update button.

**Note:** Not all data is affected by the discussion above. Only the accident facts and Defendant’s information is copied from the driver. All other data is entered manually as normal.

- Using the Update button is the best way to associate passengers to a primary client and having that association attached permanently. This means that some very brief information from the passenger’s file will be attached to the driver’s file. (See below).

The screenshot shows a software interface with a client search bar at the top containing "Client: Esquivel, Jose Angel Marko \* 96-0101 \* 10/04/2007" and a "Find" button. Below the search bar are four tabs: "PI CASES", "Client Info", "Defendant Info", and "Witness Info". A row of numbered tabs (1-16) is visible, with tab 14 highlighted in green. The main area is divided into two sections: "Settlement Information" on the left and "List of Passengers" on the right. The "List of Passengers" section includes the text "( people who are also clients of this office )" and a list of two passengers: "Montanez, Martha Stewart" with "DOB = 01/11/1966" and "Motors, Beverly" with "DOB = 06/26/1968". A blue callout box with a pointer to the "Update" button in the passenger list contains the text: "The best way to insert these names into the driver's file is to use the Update button from the Passenger file."

## Entering Defaults that Calculate Statutes

It is very important that you set up the default factors that will be used to calculate statutes in your given state. As you know, statutes are fixed dates in which each law office has a predetermined time limit to perform certain tasks concerning a case.

For example, in California the Statute of Limitations is 2 years (under most conditions). This means an attorney (and his/her client) must let the state know of his/her intention to file a law suit regarding an accident that occurred on a specific date.

One major factor that may affect this timing is if the case happens to involve a government entity (e.g. bus or other mass transit). In these cases the need to report your intention is severely cut short. 6 months in this example.

In such a case as noted above, the government will almost always “REJECT” your claims against them and this rejection status causes your statute to move again to another specific date. In California this date is moved to 6 months from the Date of Rejection.

As you might imagine, it is very important that you get on top of the issues concerning statutes early in the process of learning PI-Master. The supervisor can alter these statute “factors” by selecting the option “**Tickler Setup**” under the **Utilities** pull-down menu.

The following screen-dump will show you where this info can be entered. Note that PI-Master (when first used) is setup with some California specific settings. Use these settings as examples only.

**Note: It is up to YOU to determine how you want your office to calculate statutes.**

Note: Below we refer to the term "Key Date". The "Key Date" changes depending on circumstances (eg. Accident date, Gov't Entity or Rejection date)

Question # 1 will calculate the Statute Date as being 'X' number of days from the key date.. (Usually 1 or 2 yrs - most states)

Question # 2 will calculate the Statute Date as being 'X' number of days from the key date if the defendant is a GOVERNMENT ENTITY. (e.g. 6 mos. or approx 180 days - Calif. Only)

Question # 3 will calculate the Statute Date as being 'X' number of days from the DATE OF REJECTION.

This calculation will override the prior Statute when you enter the Rejection Date. (e.g. 6 mos. or approx 180 days - Calif. Only)

---- OTHER FACTORS MAY EFFECT YOUR STATUTE - YOU MUST VERIFY RESULTS ----

	Your Current Settings	Sample Calif. Numbers
1. Enter number of days from Accident Date	730	730 (2 years)
2. Enter number of days if Govt. Entity	180	180 (6 months)
3. Enter number of days from Rejection Date	180	180 (6 months)

Save & Exit      Save & Proceed To Automatic Tickler Setup      Cancel - Make No Changes

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## ***Important Enough To Repeat***

Since access to most of our help will be provided via the Internet, you will need to have a working connection to the web. Almost everyone nowadays has access to the Internet but if you work in an office where your “specific workstation” is not connected, you may need to temporarily ask a co-worker if you may borrow their terminal in order for you to look up a solution.

Throughout PI-Master you will find a small icon that will lead you to help concerning some important issue on the current page. Click on it and you will receive Online Help. The icon appears as below:



= Help