



The Advocate

MESSAGE FROM THE CHAIR:



Craig Gibbs

As of September 12, 2011, the Oath of Admission to the Florida Bar now reads in part, "To opposing parties and their counsel, I pledge fairness, integrity, and *civility*, not only in court, but also in all written and oral communications." (Emphasis added.) Doesn't the inclusion by our Florida Supreme Court of the term "civility" as a part of our Oath of Admission, send a strong message to Florida lawyers regarding

the need to remain civil towards one another? Just what is the Supreme Court's concern with this additional requirement and what has happened to our respective practices to warrant such an addition to our oath?

Civility is defined in part by Merriam-Webster as "2. a: civilized conduct; especially: courtesy, politeness b: a polite act or expression". Having practiced law as a civil trial litigator for almost 25 years, I have been around long enough to see that the landscape is changing with regard to our profession and the courtesy and politeness or the lack thereof, from some of the prac-

tioners within. From my tenure, I have determined that zealous advocacy is certainly important but that civility within our practices should be maintained for several reasons. First, it is just wrong and somewhat childish to be impolite, ill-mannered, or rude. Secondly, displaying a lack of civility in or out of the courtroom, as well as in our written and oral communications can not only subject a lawyer to disciplinary proceedings by The Florida Bar, or form the basis of sanctions by the Court, but it may also occasion a legal malpractice suit being brought by a client.*

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IDENTIFYING THE BEST PRACTICE MANAGEMENT SOFTWARE

By Susan L. Traylor*

"What is the best practice management software?"

In my extensive work advising on law office practice, there is no question that I am asked more frequently. As a practice management advisor for the State Bar of Arizona's Law Office Management Assistance Program (LOMAP), I work with systems and procedures to help them manage their

day-to-day work.

There is a good reason lawyers should be interested in practice management software: It is a tool that, when used correctly, can help lawyers stay on top of many of the ethical rule requirements that head the list of most-common Bar charges: Diligence, Communications, Fees, Conflicts of Interest, Safekeeping of Property and

Trust Account.

My typical response to that frequently asked question is, "I cannot tell you the best practice management software any more than I can tell you what house or car to buy for yourself." Unsatisfying answer, perhaps. However, it is true that there are many factors to consider when

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2012-13 Trial Lawyers Section Budget

(Includes Section and all sub-section budgets)

Revenue		\$ 426,181
31431	Section Dues	\$ 310,000
31432	Affiliate Dues	\$ 70
31433	Admin Fee to TFB	\$ (108,540)
32001	Registrations	\$ 78,875
35201	Sponsorships	\$ 25,000
32191	CLE Courses	\$ 85,000
32293	Section Differential	\$ 17,500
38499	Investment Allocation	\$ 18,276
Expenses		\$ 596,668
36998	Credit Card Fees	\$ 175
41201	Contract Salaries	\$ 20,000
51101	Employee Travel	\$ 8,833
61201	Equipment Rental	\$ 750
71001	Telephone/Direct	\$ 876
81411	Promotional Printing	\$ 2,225
81412	Promotional Mailing	\$ 5,300
84001	Postage	\$ 800
84002	Printing	\$ 1,000
84003	Officers Office Expense	\$ 500
84006	Newsletter	\$ 30,000
84009	Supplies	\$ 350
84010	Photocopying	\$ 350
84051	Officers Travel Expense	\$ 4,000
84052	Meeting Travel Expense	\$ 5,000
84053	Out of State Travel	\$ 2,000
84054	CLE Speaker Expense	\$ 1,200
84061	Reception	\$ 30,000
84062	Luncheons	\$ 2,100
84063	Family Dinner	\$ 10,000
84064	Golf Tour Expenses	\$ 200
84101	Committee Expense	\$ 1,000
84121	Teachers Conference	\$ 50,000
84201	Board or Council Meeting	\$ 62,000
84202	Annual Meeting	\$ 15,000
84204	Midyear Meeting	\$ -
84205	Section Service Program	\$ 3,000
84237	Entertainment Expenses	\$ 1,500
84252	A/V Equipment	\$ 700
84253	Sleeping Rooms	\$ 1,200
84301	Awards	\$ 7,000
84302	Scholarships	\$ 19,500
84315	Mock Trials	\$ 35,000
84422	Website	\$ 5,000
84501	Legislative Consultant	\$ 60,000
84503	Legislative Travel	\$ 1,000
84701	Council of Sections	\$ 300
84998	Operating Reserve	\$ 25,825
84999	Miscellaneous	\$ 7,000
85036	Fellows Sponsorships	\$ 75,000
88221	Speaker Workshops	\$ 6,000
88231	Speakers Travel	\$ 7,400
88232	Speakers Meals	\$ 2,950
88233	Speakers Hotel	\$ 27,000
88234	Speaker Honorarium	\$ 28,200
88239	Speakers Other Exp	\$ 1,000
88241	Outline Prt - Inhouse	\$ 650
88243	Outline Binders	\$ 150
88252	Course Credit Fee	\$ 450
88261	Meeting Room Rent	\$ 750
88262	Meeting Meals	\$ 7,000
88263	Meeting Hospitality	\$ 10,500
88265	Refreshment Breaks	\$ 4,000
86431	Meetings Administration	\$ 451
86543	Graphics & Art	\$ 4,483
Beginning Fund Balance		\$ 609,200



Board Certified attorney? Carry the Certification Flag!

If you're heading to an interesting destination and would like to help promote board certification, please carry our flag! Visit the Certification flag Web page, at FloridaBar.org/certification, to track the flag's travels.



Immediate past BLSE Chair Joni Armstrong Coffey of Miami visited the Parque Nacional Chiloe, a national park of Chile. Coffey is board certified in city, county and local government law. Former BLSE Chair Michael G. Tanner of Jacksonville, who is board certified in business litigation and civil trial, traveled to Cyprus, the third largest island in the Mediterranean. Robert Sugarman of Coral Gables, who is board certified in labor and employment law, journeyed to Badwater Basin, the lowest elevation point in the Western Hemisphere, in Death Valley National Park, Death Valley, CA.

The flag is available to any certified lawyer who will carry it proudly and send us photos, which will be posted on our Web page. Please contact BLSE consultant Lisa Tipton for more information: 859/561-5769.

CHAIR'S MESSAGE

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The lack of civility in the practice of law is not isolated to Florida lawyers. For example, the United States District Court in the Western District of Oklahoma recently admonished an attorney for various unprofessional letters in response to a Motion for Protective Order Directing Defendant Counsel to Cease Offensive and Unprofessional Attacks on Plaintiff's counsel and Interference with the Law Practice of Wilson, Cain & Acquaviva. (See Sean Johnson vs. Government Employees Insurance Company, Case NO. CIV-07-868-M, Dist. Ct. Western Oklahoma, 2008). The District Court cited in its order the following excerpts from a letter directed to opposing counsel:

I am in receipt of your second fax to me of August 9, 2007, in the above case. Please stop the charade. Your self-serving comments are putting me to sleep.

There are people out there who work hard every day – like teachers, coaches, policemen, and firemen – and who make a difference in peoples' lives every day. They live on a meager existence. Then, there are people like you who seem to thrive on creating havoc. People like you have no intention of making the world a better place to live. Their only interest is in making lots of money for themselves.

Please spare me your phony sermons. I do not want any more of your self-serving letters; save the paper.

Further, at a show cause hearing in the case, to show cause why sanctions should not be imposed against the offending attorney for drafting and sending to opposing counsel, the following handwritten comment in a letter dated August 9, 2007 appeared:

Mr. Bernstein—

Can you not say anything in a page or less? Who are you? You're just a broker who refers difficult cases to experienced lawyers. You're a witness in this case. Be like a potted plant and sit quietly in a corner.

The Court found that no monetary sanction should be imposed against the uncivil, unprofessional lawyer, but interestingly, instead imposed more of an elementary school type of punishment for the offensive attorney's somewhat childish behavior. The Court directed that within six (6) months of its order, the highly unprofessional communications with opposing counsel should be remedied by the submission to the Oklahoma Bar Journal, an article to be published therein, pertaining to civility and professionalism as they relate to adversarial proceedings. And, he must include within the article, the reasons why he is writing it, and write the article to younger/newer lawyers. And finally, he must of course, submit a copy of the article to the Court. Such a "Teacher-I-will-not-chew-gum-in-school"-type of sanction, [of course written the proverbial one hundred (100) times] maybe considered somewhat juvenile for such indecorous behavior, but may be most effective in securing compliance with the type of conduct, worthy of those who ascribe to practice in our noble profession.

Many years ago when our Bar had fewer members and everyone knew, or was vaguely familiar with each other, the requirement for civility in an oath was unheard of. Now our Bar numbers almost 100,000 members—a relatively large number of strangers, one to another, and a relatively large number to "police" in order to proscribe or curtail limits on one another's behavior and maintain the bounds of common decency. Into this breach was birthed the idea

by former Section Chair the late Glenn Burton, of a social, educational, and recreational endeavor, the Annual Trial Lawyers Summit. His concept for the Summit was based on the understanding that it's more difficult to be rude to someone you know, than it is to someone that you do not know.

Our first annual Summit, convened at the Omni Champions' Gate hotel near Orlando in mid-January of this year, was a rousing success. Our hope is that our second annual Summit, scheduled for Wednesday, January 25, 2012 to Saturday, January 28, 2012 at the JW Marriott Orlando Grande Lakes, will also be an achievement of the Section's efforts. Many activities are planned by our Summit Chair, attorney Robert Palmer, III including:

1. Our annual Chester Bedell Mock Trial competition will begin on Wednesday, January 25, 2012 at the JW Marriott with once again, all eleven (11) of Florida's law schools in competition. The final round of the competition will be on Thursday afternoon, January 26, 2012 and will be presided over by the Honorable Belvin Perry, Jr., Chief Judge of the Ninth Judicial Circuit.

2. The annual Civil Trial Certification Review course begins on Thursday morning and ends the following evening. Our luncheon speaker for Thursday's luncheon will be Stephen Zack, immediate past President of the American Bar Association, and a past President of the Florida Bar. Our luncheon speaker for Friday's luncheon will be someone from the Civil Trial Certification Committee, who will offer remarks and thereby provide insight into the Civil Trial Certification Exam.

3. A reception on Thursday evening for the winners of the Mock Trial Competition, as well as all Civil Trial Certification attendees is planned. Our keynote speaker for the evening whose life in the

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CHAIR'S MESSAGE

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legal profession in this country is unparalleled, his having been a significant part of our nation's recent legal history, participating in many landmark United States Supreme court cases and representing such noteworthy clients as Rosa Parks and Dr. Martin Luther King, Jr., the legendary civil rights attorney, Fred Gray. Attorney Gray's riveting rendition of his work throughout the last half of the 20th century, as well as his current efforts, provides a discerning, first-hand account of a walk through history—clearly from a unique perspective, and is not to be missed.

4. A Thursday evening Members of the Section social event featuring cocktails, heavy hors d'oeuvres, and dancing to the tunes of the band "GoodbyEddie", a favorite from last year's Summit, and lead by Section treasurer, Ted Eastmoore of Sarasota.

5. On Saturday morning, we will offer CLE seminars which involve technology in the practice of law by Ray Reid of Pajcic & Pajcic of Jacksonville offering "Effective Use of Technology in Trial", a comprehensive look into the use of technology in mediations and in the courtroom. We will also offer that morning "The Ten Best Ways to Commit Malpractice with Your Lack of Technology" by Florida Lawyer Mutual Insurance Company's (F.L.M.I.C.'s) Nancy

Stuparich, and Bill Robinson, as we examine how our respective practices continue to move, technologically speaking, with light-speed into the 21st century and the pitfalls found therein.

Each of these Summit offerings are geared to provide the trial attorney with some of the necessary tools as we seek to encourage a decline in attorney misbehavior involving impoliteness, offensiveness or disrespect toward each other or to the tribunal. Many attorneys of more vintage years seem to believe that the present legal state that we find ourselves in, what with international firms, international videoconferencing for depositions and other procedures and with the global reach of the internet, that civility in our practices is almost daily growing worse. Our effort via the Summit is to make all attorneys more civil practitioners; whether in or out of the courtroom and thereby reduce his/her potential exposure from his/her client, the various tribunals, and to the larger public, to which he/she serves.

Please plan to join us for any or all of the activities, and I hope to see you there.

Footnote:

* Please see an article entitled "Civility: A Way to Prevent Disciplinary Action and Legal Malpractice Claims" by Craig Gibbs, Esquire in F.L.M.I.C.'s, *The Advisor*, December, 2011.

The Advocate is prepared and published by the Trial Lawyers Section of The Florida Bar.

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Statement or expressions of opinion are those of the editor and contributors and not of The Florida Bar or the Section.

Section calendar

Look for brochures in the mail
and information on the
Trial Lawyer Section's website:
www.flatls.org

2012

January 24-26, 2012

Chester Bedell Mock Trial Competition

JW Marriott, Orlando

January 26 - 28, 2012

2nd Annual Trial Lawyers Summit

JW Marriott, Orlando

January 26 - 27, 2012

Civil Trial Certification Review

JW Marriott, Orlando

January 28, 2012

Executive Council Meeting

JW Marriott, Orlando

March 2, 2012

Topics in Evidence (co-sponsored with Code & Rules of Evidence and Criminal Law Section)

Tampa Airport Marriott

April 26 - 28, 2012

Executive Council Meeting

Hilton Barbados

May 8 - 12, 2012

Advanced Trial Advocacy Seminar

UF Law School, Gainesville



**THE
FLORIDA
BAR
CLE**

The Florida Bar Continuing Legal Education Committee and the Trial Lawyers Section present

Civil Trial Certification Review 2012



COURSE CLASSIFICATION: ADVANCED LEVEL

Live Presentation and Webcast: January 26-27, 2012
JW Marriott Orlando Grande Lakes • 4040 Central Florida Parkway
Orlando, FL 32837 • 407-206-2300

Course No. 1310R

THURSDAY, JANUARY 26, 2012

8:30 a.m. – 8:50 a.m.

Late Registration

8:50 a.m. – 9:00 a.m.

Opening Remarks

Edward K. Cheffy, Naples

9:00 a.m. – 10:45 a.m.

Civil Procedure

Matthew J. Conigliaro, St. Petersburg

10:45 a.m. – 11:00 a.m.

Break

11:00 a.m. – 12:15 p.m.

Trial Skills: Opening and Closing

F. Gregory Barnhart, West Palm Beach

12:15 p.m. – 1:30 p.m.

Lunch (included in registration fee)

Raising the Bar on Ethics and Professionalism

Stephen N. Zack, Miami

1:30 p.m. – 3:00 p.m.

Trial Skills: Preserving the Record for Appeal

Jack J. Aiello, West Palm Beach

3:00 p.m. – 3:15 p.m.

Break

3:15 p.m. – 4:15 p.m.

Recent Developments in Business Litigation

Maxine M. Long, Miami

4:15 p.m. – 5:30 p.m.

Trial Skills: Voir Dire

William E. Hahn, Tampa

FRIDAY, JANUARY 27, 2012

9:00 a.m. – 10:45 a.m.

Ethics

Edward K. Cheffy, Naples

10:45 a.m. – 11:00 a.m.

Break

11:00 a.m. – 12:00 noon

Recent Developments in Personal Injury and Wrongful Death

Gary D. Fox, Miami

12:00 noon – 1:30 p.m.

Lunch (included in registration fee)

Remarks about the Certification Exam

Civil Trial Certification Committee

1:30 p.m. – 2:30 p.m.

Trial Skills: Examination of Witnesses (including Experts, Frye Motions and Motions in Limine)

Patricia Lowry, West Palm Beach

2:30 p.m. – 2:45 p.m.

Break

2:45 p.m. – 5:00 p.m.

Evidence

Professor Charles Ehrhardt, Tallahassee

CLE CREDITS

CLER PROGRAM

(Max. Credit: 17.0 hours)

General: 17.0 hours

Ethics: 3.5 hours

CERTIFICATION PROGRAM

(Max. Credit: 17.0 hours)

Appellate Practice: 2.0 hours

Business Litigation: 14.0 hours

Civil Trial: 17.0 hours

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

WEBCAST CONNECTION:

Registrants will receive webcast connection instructions two days prior to the scheduled course date via e-mail. If The Florida Bar does not have your e-mail address, contact the Order Entry Department at 850-561-5831, two days prior to the event for the instructions.

TO REGISTER



ON-LINE:
www.floridabar.org/CLE



MAIL:
 Completed form with check



FAX:
 Completed form to 850/561-9413

REFUND POLICY: Requests for refund or credit toward the purchase of the audio CD / DVD or course books for this program **must be in writing and postmarked** no later than two business days following the course presentation. Registration fees are non-transferrable, unless transferred to a colleague registering at the same price paid. A \$25 service fee applies to refund requests. Registrants who do not notify The Florida Bar by 5:00 p.m., January 13, 2012 that they will be unable to attend the seminar, will have an additional \$100 retained. Persons attending under the policy of fee waivers will be required to pay \$100.

HOTEL RESERVATIONS: A block of rooms has been reserved at the JW Marriott Hotel, at the rate of \$229 single/double occupancy. To make reservations, call the JW Marriott directly at 800-266-9432. Reservations must be made by 1/3/12 to assure the group rate and availability. After that date, the group rate will be granted on a "space available" basis. Please refer to "Trial Lawyers Section Annual Summit" when making room reservations.

Register me for the "Civil Trial Certification Review 2012" Seminar

ONE LOCATION: (065) JW MARRIOTT ORLANDO GREAT LAKES, ORLANDO (JANUARY 26-27, 2012)

TO REGISTER OR ORDER AUDIO CD / DVD OR COURSE BOOKS BY MAIL, SEND THIS FORM TO: The Florida Bar, Order Entry Department, 651 E. Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount payable to The Florida Bar or credit card information filled in below. If you have questions, call 850/561-5831. ON-SITE REGISTRATION, ADD \$25.00. **On-site registration is by check only.**

Name _____ Florida Bar # _____

Address _____ Phone: () _____

City/State/Zip _____ E-mail* _____

**E-mail address required to transmit electronic course materials and is only used for this order.*

WPG: Course No. 1310R

ELECTRONIC MATERIALS: Effective July 1, 2010, every CLE course will feature an electronic course book in lieu of a printed book for all live presentations, live webcasts, webinars, teleseminars, audio CDs and video DVDs. This searchable, downloadable, printable material will be available via e-mail several days in advance of the live course presentation or thereafter for purchased products. We strongly encourage you to purchase the book separately if you prefer your material printed but do not want to print it yourself.

LOCATION (CHECK ONE):

- Orlando, January 26-27, 2012**
(065) JW Marriott Orlando Great Lakes
- Live Webcast / Virtual Seminar***
January 26-27, 2012
(317) Online

**Registrants who participate in the live webcast will receive an email with a web-link and log-in credentials two days prior to the seminar to include access to the course materials. Call The Florida Bar Order Entry Department at (800) 342-8060, ext. 5831 with any questions.*

REGISTRATION FEE (CHECK ONE):

- Member of the Trial Lawyers Section: \$450
- Non-section member: \$500
- Full-time law college faculty or full-time law student: \$300
- Persons attending under the policy of fee waivers: \$100

Members of The Florida Bar who are Supreme Court, Federal, DCA, circuit judges, county judges, magistrates, judges of compensation claims, full-time administrative law judges, and court appointed hearing officers, or full-time legal aid attorneys for programs directly related to their client practice are eligible upon written request and personal use only, complimentary admission to any live CLE Committee sponsored course. Not applicable to webcast. (We reserve the right to verify employment.)

WEBCAST:

- \$535
- \$585

METHOD OF PAYMENT (CHECK ONE):


- Check enclosed made payable to The Florida Bar
- Credit Card (Advance registration only. Fax to 850/561-9413.)
 MASTERCARD VISA DISCOVER AMEX Exp. Date: ___/___ (MO./YR.)

Signature: _____

Name on Card: _____

Billing Zip Code: _____

Card No. _____



Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

Enclosed is my separate check in the amount of \$50 to join the Trial Lawyers Section. Membership expires June 30, 2012.

COURSE BOOK — AUDIO CD — DVD — ON-LINE — PUBLICATIONS

Private recording of this program is not permitted. **Delivery time is 4 to 6 weeks after 01/27/12. TO ORDER AUDIO CD / DVD OR COURSE BOOKS**, fill out the order form above, including a street address for delivery. **Please add sales tax. Tax exempt entities must pay the non-section member price.** Those eligible for the above mentioned fee waiver may order a complimentary audio CD in lieu of live attendance upon written request and for personal use only.

Please include sales tax unless ordering party is tax-exempt or a nonresident of Florida. If this order is to be purchased by a tax-exempt organization, the media must be mailed to that organization and not to a person. Include tax-exempt number beside organization's name on the order form.

<input type="checkbox"/> COURSE BOOK ONLY (1310M) Cost \$70 plus tax (Certification/CLER credit is not awarded for the purchase of the course book only.) TOTAL \$ _____	<input type="checkbox"/> AUDIO CD (1310C) (includes electronic course material) \$450 plus tax (section member) \$500 plus tax (non-section member) TOTAL \$ _____	<input type="checkbox"/> DVD (1310D) (includes electronic course material) \$525 plus tax (section member) \$575 plus tax (non-section member) TOTAL \$ _____
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Related Florida Bar Publications can be found at <http://www.lexisnexis.com/flabar/>

IDENTIFYING THE BEST PRACTICE MANAGEMENT SOFTWARE

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selecting the software that is the best fit for you and your item. Most all know something about cars and houses. But if you have never used it, you'd better learn something about the legal specific category of software.

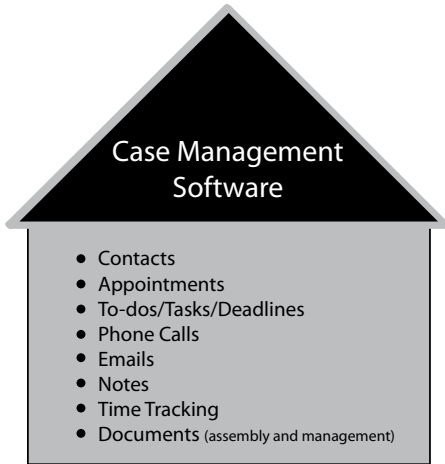
DEFINING "PRACTICE MANAGEMENT SOFTWARE"

Historically referred to as "case management software," practice management software (PMS) is a category of software designed specifically for the legal field. The priority distinction is that it is case-centric, rather than contact-centric like many of the non-legal-specific contact manager software that has flooded the market.

Lawyers work on cases (or matters or files). Although the client (a contact) may continue on for years, it is the case that has a beginning, middle and an end. There are people (other contacts), communications, documents, due dates, appointments, billable time, all related to the case.

Likewise, the lawyer may represent the same client for different cases, either simultaneously or sequentially, all of which cases have related (or linked) people, communications, documents, due dates, appointments and billable time.

Illustration 1.



Examples of traditional case management software are Abacus Law, Amicus Attorney, Time Matters, Practice Master, Legal Files, Client Profiles, ProLaw, Perfect Office, Daylite (Mac), Lawstream (Mac).

TWO PARTS OF THE OFFICE

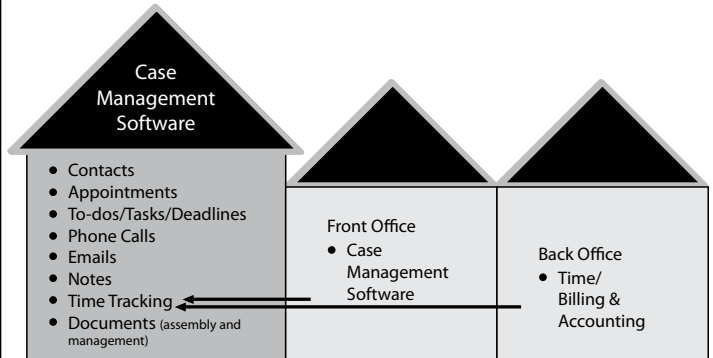
Two other important concepts to understand are "front office" and "back office."

If you think about the traditional law firm, the lawyers, paralegals, secretaries and clerks handle people, phone calls, email, document generation, document management, date-setting, appointments and billing time tracking. These functions are referred to as front office.

Typically, the Time, billing and accounting functions (bills, expenses, payments, trust account, general firm accounting, and so forth) were handled by one or two staff in the firm (i.e., the bookkeeper or accounting department).

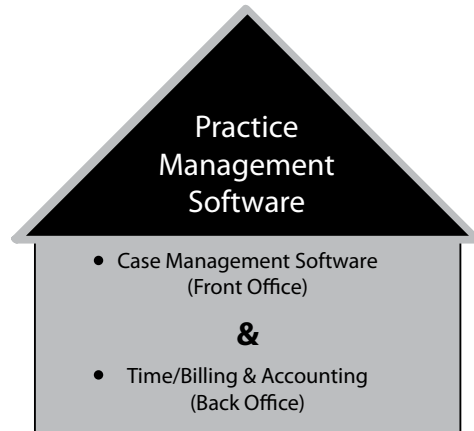
These functions are referred to as back office. Software developed specifically for this back office function became popular independently from the front office (or case management) software.

Examples of back office software that do Time, billing and accounting functions are LexisNexis, PCLaw, Juris, Abacus Accounting, Amicus Accounting, QuickBooks Pro, Lexis Nexis' Billing Matters. Those that do time and billing are Tab3/Tab3 Trust Accounting, TimeSlips, EasyTimeBill/EasyTrust, Amicus Premium Billing, Tusman, Bill4Time, BillQuick and more.



As case management software grew in popularity, so grew a demand for the front office software to "talk to" (integrate with) the back office software. That way, you could continue using your preferred back office solution, and simply add to it front office features, or vice versa.

The Contact and Case Information is typically shared in both directions, whereas the time records are unidirectional. That is, once tracked in the front office, the time records are sent to the back office. Eventually, many of the practice management (front office) software developed their own back office software so that everything would be seamless to set up and so that front office and back office software would play nicely together. In some situations, the back office is built-in to the front office; in other situations, it is a separate program or module.



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IDENTIFYING THE BEST PRACTICE MANAGEMENT SOFTWARE

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In summary, PMS today is most commonly used to describe the front office functions, either with a built-in back office functionality or the ability to “link with” (or talk to) another software designed to handle the back office functions.

TRADITIONAL SOLUTIONS MEET MODERN TRENDS

The PMS solutions discussed previously have been around for many years. Those traditional solutions are software that you purchase, install on your server and/or computers in your firm, and you own the software and the data you put into the software. You typically subscribe to an annual support plan with the vendor and, if you are doing it correctly, you also pay for initial training and initial setup help. Depending on your needs, as well as the particular software you purchase, you may need routine customization and maintenance of that software. The vendor periodically announces software upgrades, at which time you wonder whether you need to upgrade or not.

Over the recent past, several new PMS options have appeared on the market. These newer solutions have taken advantage of the recent acceptance of cloud-based technology (aka SaaS or Software-as-a-Service), where the vendor holds both the software and the data, and the user merely subscribes on a monthly basis to use the software.

The SaaS solutions are appealing because the firm does not need to invest in high-end servers and does not have to invest in ongoing maintenance and upgrades. In addition, the software is accessible from anywhere there is Internet access, and many of the solutions have time, billing and trust accounting functions built-in with the front office functions.

Though the SaaS solutions are ahead of the traditional solutions on mobility (cloud-based access from anywhere),

some of the SaaS products are slow to develop document assembly and email integration, features that are standard in traditional PMS.

Examples of these SaaS or cloud-based practice management solutions are Clio, Rocket Matter, HoudiniEsq, LexisNexis’ Firm Manager, Abacus Sky, ProTempus, competeLaw Web and LiviaLegal.

In an effort to compete with the attractive mobility functionality of the cloud-based solutions, many of the traditional PMS have developed features that allow users to access contacts, cases, appointments, to-dos, time, and/or expenses from their smartphones. Examples of this are Amicus Mobile and LexisNexis Time Matters Mobility.

PRACTICE-SPECIFIC PRACTICE MANAGEMENT SOFTWARE

If you practice in a specific area of law, there is software designed specifically for your practice area. That is not to say that generic, out-of-the-box software cannot be customized to accommodate these specific practice areas (and some even offer practice-specific modules at an additional charge). It simply means that if you are practicing in one specific area and that area only, it may be a good idea

for you to start by researching those software options first.

Keep in mind that some of these practice-specific solutions may not include all of the basic features of the out-of-the-box traditional PMS.

Examples of practice-specific software are ImmPro, LawLogix (immigration), BestCase (bankruptcy), Needles, TrialWords (personal injury), Justare (public law) and Serengeti (corporate legal).

WHAT PRACTICE MANAGEMENT SOFTWARE IS NOT

When the American Bar Association’s Legal Technology Resource Center performed a survey of law firms, asking them which PMS they used, a

large percentage of firms responded that they use Outlook. Although Outlook may be a great tool in helping lawyers manage their day-to-day schedules, deadlines, contacts and emails, it does not fall under the category of PMS. It is contact-centric software, not case-centric software.

(Note: The exception to this is an Outlook “plug-in” called Credenza, which adds case-centric functionality to Outlook. Credenza is a hybrid type of SaaS. Although you must subscribe to the software, which is added to your Outlook, you always retain the active data in a file on your computer.)

Many lawyers confuse PMS with document management software (DMS). In the quest to go paperless, many firms are looking for software that will help them manage digital documents. But while many PMS do have DMS capability built-in or have the ability to link with many DMS, most DMS do not have in practice management capability. So although your DMS solution may go far to take you to the paperless law office, it will fall short of helping you stay on top of those ethical rules on diligence, communication, fees (time tracking) and conflicts. Examples of Document Management Software are Worldox, iManage/Autonomy, Open Text and NetDocs.

There is yet another category of law practice software called “litigation support” software. This is software designed to manage litigation documents (e.g., evidence, depositions, and annotations). Though some of the PMS may integrate with litigation support software, litigation support software is more closely related to DMS and does not have the features of PMS. Examples of litigation support software are Summation, Concordance, Sanction, Trial Director, Vision and CaseMap.

Finally, PMS does not mean Google Apps, or Microsoft Office 365. Though these may be very attractive because they are free or inexpensive, they do provide some basic recordkeeping functions (calendar, documents, and communications). And although they

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PMS or Practice Management Software may have DMS or Document Management Software available but document management software is not practice management software.



The Florida Bar Trial Lawyers Section
presents the

2nd Annual Trial Lawyers Summit

January 26-28, 2012

JW Marriott Orlando Grande Lakes

4040 Central Florida Parkway
Orlando, FL 32837

Summit program featuring:

- Annual Civil Trial Certification Review Seminar
- *Speaker, Stephen Zack, Immediate Past President of the American Bar Association*
- *Speaker, Fred Gray, Pioneer Civil Rights Lawyer*
- Mix & mingle at Reception
- Effective Use of Technology in Trial Seminar
- The Ten Best Ways to Commit Malpractice with Your Lack of Technology

ADVOCATES FOR CLIENTS
COMMITTED to CIVILITY and COMPETENCE

SCHEDULE OF EVENTS

Wednesday, January 25, 2012

8:30 a.m. – 6:30 p.m. **Chester Bedell Mock Trial Competition – Day One**

Thursday, January 26, 2012

8:30 a.m. – 6:30 p.m. **Chester Bedell Mock Trial Competition – Day Two**

Civil Trial Certification Review

8:30 a.m. – 8:50 a.m. **Late Registration**

8:50 a.m. – 9:00 a.m. **Opening Remarks**
Edward K. Cheffy, Naples

9:00 a.m. – 10:45 a.m. **Civil Procedure**
Matthew J. Conigliaro, St. Petersburg

10:45 a.m. – 11:00 a.m. **Break**

11:00 a.m. – 12:15 p.m. **Trial Skills: Opening and Closing**
F. Gregory Barnhart, West Palm Beach

12:15 p.m. – 1:30 p.m. **Luncheon**
Being ABA President When the Judiciary is Under Attack Everywhere
Stephen N. Zack, Miami

1:30 p.m. – 3:00 p.m. **Trial Skills: Preserving the Record for Appeal**
Jack J. Aiello, West Palm Beach

3:00 p.m. – 3:15 p.m. **Break**

3:15 p.m. – 4:15 p.m. **Recent Developments in Business Litigation**
Maxine M. Long, Miami

4:15 p.m. – 5:30 p.m. **Trial Skills: Voir Dire**
William E. Hahn, Tampa

6:00 p.m. – 7:30 p.m. **Reception for Mock Trial Winners and Section members**

7:30 p.m. – 8:30 p.m. **Fred Gray, Keynote Speaker**

8:30 p.m. – Until **Members Social Event and Dance**
Mix and Mingle at this private gathering and enjoy heavy hors d'oeuvres, and dance to the tunes by the the band "GOODBYEDDIE"

Friday, January 27, 2012

9:00 a.m. – 10:45 a.m. **Ethics**
Edward K. Cheffy, Naples

10:45 a.m. – 11:00 a.m. **Break**

11:00 a.m. – 12:00 noon **Recent Developments in Personal Injury and Wrongful Death**
Gary D. Fox, Miami

12:00 noon – 1:30 p.m. **Lunch (included in registration fee) Remarks about the Certification Exam**
Civil Trial Certification Committee

1:30 p.m. – 2:30 p.m. **Trial Skills: Examination of Witnesses (including Experts, Frye Motions and Motions in Limine)**
Patricia Lowry, West Palm Beach



Fred Gray

- Prominent Alabama civil rights pioneer whose clients have included Martin Luther King Jr., and Rosa Parks
- Gray has spent a lifetime fighting social injustice.
- Former President of the National Bar Association
- First African-American President of the Alabama State Bar
- Awarded the Spirit of Excellence Award from the American Bar Association.
- Author of "*Bus Ride to Justice: Changing the System by the System*"

Friday, January 27, 2012 (continued)

2:30 p.m. – 2:45 p.m. **Break**

2:45 p.m. – 5:00 p.m. **Evidence**
Professor Charles Ehrhardt, Tallahassee

Saturday, January 28, 2012

8:00 a.m. – 8:30 a.m. **Late Registration for Effective Use of Technology in Trial**

8:30 a.m. – 10:20 a.m. **Effective Use of Technology in Trial**
Ray Reid, Pajcic & Pajcic, Jacksonville

9:00 a.m. – 12:00 p.m. **Trial Lawyers Section Executive Council Meeting**

10:20 a.m. – 10:30 a.m. **Late Registration for The Ten Best Ways to Commit Malpractice with Your Lack of Tecnology**

10:30 a.m. – 11:20 a.m. **The Ten Best Ways to Commit Malpractice with Your Lack of Technology**
Nancy Stuparich, Orlando
Bill Robinson, Orlando

11:30 a.m. – 12:20 p.m. **Medicare Secondary Payer Act Compliance: Protect your Firm & Protect your Client by Protecting Medicare's Interest**
Seth D. Ellis, CPA

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Trial Exhibits, Inc.*

CLE CREDITS

Civil Trial Certification Review 2012

(Course No. 1310R)

CLER PROGRAM
(Max. Credit: 17.0 hours)

General: 17.0 hours
Ethics: 3.5 hours

CERTIFICATION PROGRAM
(Max. Credit: 17.0 hours)

Appellate Practice: 2.0 hours
Business Litigation: 14.0 hours
Civil Trial: 17.0 hours

**Effective Use of
Technology in Trial**
(Course No. 84591)

CLER PROGRAM
(Max. Credit: 2.0 hours)

General: 2.0 hours

**The Ten Best Ways to
Commit Malpractice with
Your Lack of Technology**

(Course No. 84581)

CLER PROGRAM
(Max. Credit: 1.0 hour)

General: 1.0 hour
Ethics: 1.0 hour

**Medicare Secondary Payer Act Compliance:
Protect your Firm & Protect your Client by
Protecting Medicare's Interest**

(Course No. 85311)

CLER PROGRAM
(Max. Credit: 1.0 hour)

General: 1.0 hour

CERTIFICATION PROGRAM
(Max. Credit: 0.5 hour)

Health Law: 0.5 hour

VENUE DETAILS



Unmatched among Orlando luxury resorts, the JW Marriott Orlando Grande Lakes is an architecturally stunning structure set amid 500 lush acres of tropical landscape. This dazzling Orlando luxury hotel gives guests an experience unlike any other, yet is just minutes from America's playground. Our JW Marriott Orlando luxury hotel offers guests a wealth of lavish amenities, from oversized marble bathtubs and remarkable resort views, to a refreshing spa and the world-class Greg Norman-designed golf course. Enjoy Southern Italian cuisine at Primo, or hand-rolled sushi in the Lobby Lounge, among an array of dining options sure to please any palette. Perfectly positioned as a quiet retreat, the JW Marriott Orlando Hotel is also located near the city's top attractions. Discover an Orlando luxury hotel ideal for hosting everything from business benefits to social soirees in over 100,000 square feet of elegant space. For any occasion, let the JW Marriott Orlando, Florida luxury hotel welcome you with charming grace.



HOTEL RESERVATIONS

A block of rooms has been reserved the rate of \$229 single/double occupancy. To make reservations, call the JW Marriott Orlando directly at 800-266-9432. **Reservations must be made by 1/3/12 to assure the group rate and availability.** After that date, the group rate will be granted on a "space available" basis. Please refer to "Trial Lawyers Section Annual Summit" when making room reservations.

Register Now!

2nd Annual Trial Lawyers Summit

The Florida Bar
651 E. Jefferson Street
Tallahassee, FL 32399-2300

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Register me for the "2nd Annual Trial Lawyers Summit"

LOCATION: JW Marriott Orlando Grande Lakes (January 26-28, 2012)

TO REGISTER BY MAIL, SEND THIS FORM TO: The Florida Bar, Paige Graham, Program Administrator, 651 East Jefferson Street, Tallahassee, FL 32399-2300 with a check in the appropriate amount made payable to The Florida Bar or credit card information filled in below. If you have any questions, please call (850) 561-5628. ON SITE REGISTRATION, ADD \$25.00. On Site Registration is by check only.

Name _____ Florida Bar # _____
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REGISTRATION FEE (CHECK ALL THAT APPLY)

Civil Trial Certification Review 2012 (Course No. 1310R309)

Webcast:

- Member of the Trial Lawyers Section: \$450 \$535
- Non Section Member: \$500 \$585

- Thursday Luncheon:** \$45 (#8200018)
(includes \$2.75 FL sales tax)
(Lunch included for Civil Certification Review attendees)

Thursday Night Members Social Event

- Member of the Trial Lawyers Section: \$100 (#8200019)
(includes \$6.10 FL sales tax)
- Non Section Member: \$125 (#8200020)
(includes \$7.63 FL sales tax)
- Guest: \$35 (#8200021)
(includes \$2.14 FL sales tax)
Print name: _____

Effective Use of Technology in Trial (Course No. 84591)

- Member of the Trial Lawyers Section: \$95 (#8200022)
- Non Section Member: \$145 (#8200023)

The Ten Best Ways to Commit Malpractice with Your Lack of Technology (Course No. 84581)

- Member of the Trial Lawyers Section: \$95 (#8200024)
- Non Section Member: \$145 (#8200025)

Medicare Secondary Payer Act Compliance: Protect your Firm & Protect your Client by Protecting Medicare's Interest (Course No. 85311)

- Free Seminar (#8200026)
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- Check enclosed made payable to: The Florida Bar
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Please check here if you have a disability that may require special attention or services. To ensure availability of appropriate accommodations, attach a general description of your needs. We will contact you for further coordination.

REFUND POLICY: There will be no refunds for Section Events after January 13, 2012.

IDENTIFYING THE BEST PRACTICE MANAGEMENT SOFTWARE

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may have some features (like Google voice) that are attractive and helpful to lawyers starting a practice or transitioning to a paperless office, they are not designed specifically for law practice and therefore would not be categorized as a full-featured PMS.

HOW DO YOU GO ABOUT CHOOSING PRACTICE MANAGEMENT SOFTWARE THAT FITS?

Basic Features

If you really use your PMS, you will find that you “live in it” every day, as you do a house. Just as you would expect a house to have basic features such as kitchen, bathroom, bedroom, living room and perhaps a dining room, you should expect any good PMS to have the following features: contacts, cases/matters/files, appointments, to-dos, automated calendaring, phone records, the ability to save incoming and outgoing emails and attachments, timekeeping, basic document assembly, basic document management, and billing and accounting or a link with billing and accounting software.

Distinguishing Features

In addition to basic features, you may prefer a few bells and whistles, like a walk-in closet or three-car garage. Likewise, the PMS differ. It is in this area where you may begin to quickly narrow down your choices. Examples of distinguishing features are: particularly robust document management functionality; notably user-friendly features like automated calendaring, document assembly or conflicts of interest features; instant messages to be used within the firm; ability to color-code the calendar entities; strong reporting capabilities; and ability to create your own record types.

Integration With Billing/Accounting Software

For instance, you may be using Timeslips, PCLaw, Juris, Tabs3 or QuickBooks Pro for your back office and prefer not to change. You would then need a PMS that plays nicely with that software.

Integration With Outlook, Novell Or Operating Systems Such As Mac

Because smartphone (iPhone, Droid,

etc.) and iPad/tablets are a major driving force behind the move to be mobile and go paperless, this is one of the most important issues to be considered when selecting PMS solution for your practice.

Standout Feature(s)

One of the ways the PMS compete with each other is in the area of standout features—having one or more features that the other software do not have or do not do as well. Ex-

amples: Abacus Law’s PDF Form Fill, web-based intake form feature, or practice-specific Matter screens; Time Matters’ tight integration with LexisNexis research or timetable for setting up frequently used deadline intervals; Amicus Attorney’s Library for storing and organizing firm resources, phone and email “inbox” called “ComCenter”; and ProLaw’s tight integration with Westlaw research.

Mobility
How do you want to work remotely with your PMS? Will you have it installed at your office and merely need to “login” to access information? Or will you be a mobile lawyer who does not want to be restricted to a brick and mortar office? Will you use VPN (Virtual Private Network) or GoToMyPC or LogMeIn to log directly onto your computer from outside the office? Or do you have a branch office that will routinely need to access the firm network? Does the PMS offer different remote access options (e.g., Terminal Services)?

Style

Just as you may choose a house because you like the layout or the windows or the yard, it is important that you choose a PMS solution that appeals to you aesthetically. You will be opening your software every day and “living” in it. Understandably, if you are not accustomed to working in a database or PMS, you may need some initial training to become familiar with how to get around in it, but you should get a good sense of your comfort level in the software during a free demonstration. If

you have other staff in your firm, consider their comfort level too.

Training, Support

Setup, implementation and training are key to successfully using your software. With the traditional PMS solutions, many vendors are transitioning to a fee schedule that includes annual

support and, in fact, requires that you maintain that support on an annual basis. Typically, these vendors also provide many options for training

You must “live-in” practice management software or live with document management software to know if it right for you.

(e.g., bundled training sessions at the time of software purchase, web-based classes, local consultants who can come to your firm or trainers sent to your office). Some vendors give free webinar trainings.

WHAT IS THE BEST PRACTICE MANAGEMENT SOFTWARE?

The second-most frequently asked question I receive about PMS comes from firms that insist a product they currently use cannot perform a particular function—so they want to switch. More often than not, after a bit of research, we discover that in fact their software can perform that function. They simply did not know it.

The conclusion from all of this is that there are many excellent PMS solutions on the market these days. Much of the success of any PMS solution is proper selection, setup, training and implementation. Ultimately, the best PMS is:

- The one that gets used
- The one that gets used effectively by everyone in the firm
- The one that accomplishes the requisite tasks (basic features of PMS)
- The one that plays nicely with your other software and devices
- The one that stays competitive with technological developments

The one that gives you a return on your investment

- The one that is there when you need it.

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IDENTIFYING THE BEST PRACTICE MANAGEMENT SOFTWARE

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PRACTICE MANAGEMENT SOFTWARE PRODUCTS As of August 29, 2011

SOFTWARE Name, Phone and URL	DESCRIPTION (according to vendor website)	PRICE
Abacus Law (800) 726-3339 www.abacuslaw.com	Simply Your Practice: AbacusLaw is an all-in-one, easy to use solution designed specifically for law firms. With our fully integrated practice management software, you will be able to work more efficiently, lower risk and improve client service. . . legal calendaring software, contact management, case management, document handling, document production, conflict checks, phone messaging, time capture, law office billing and accounting—so you can do anything and retrieve anything from one location. . . AbacusLaw is the only software that can combine multiple practice area so easily.	Versions available in: <ul style="list-style-type: none"> • AbacusLaw: front office only • AbacusLaw Gold: front and back office • Enterprise: Fortress version for different Practice-Specific versions for several practice areas.
Abacus Sky 800) 855-222-2878 www.abacuslaw.com	SaaS (Software as a Service) Abacus Sky comes with AbacusLaw . . . (see above) . . . Microsoft Office and Outlook, a Microsoft Exchange Server, state-of-the-art security, daily back-ups and 24/7 management. Easily add any other software you wish.	See vendor website for more details.
Amicus Attorney (800) 482-9227 www.amicusattorney.com	Amicus Attorney is designed to help legal professionals improve the efficiency and profitability of their firms and to help them get the most out of the time they spend practicing law . . . Designed by lawyers for lawyers, this world leading software provides a comfortable, familiar environment. . . . Manage every aspect of your practice from Files, to Contacts, to Calendaring, to Time Tracking, E-mail to Phone Calls, Documents to Research.	Small Firm Edition (< 10 users) <ul style="list-style-type: none"> • \$499/1st User • \$399/Ea. Add'l User Premium Edition (> 10 Users) <ul style="list-style-type: none"> • \$999/1st User • \$599/Ea. Add'l User Amicus Small Firm Accounting <ul style="list-style-type: none"> • \$399/1st User • \$299/Ea. Add'l User Amicus Premium Billing: <ul style="list-style-type: none"> • \$199/User Amicus Mobile <ul style="list-style-type: none"> • Server: \$499/User • Licenses: \$149/User
Client Profiles (Case Management) (770) 640-0300 www.clientprofiles.com	Providing solutions that span a suite of product offerings including Case Management (CRM) and Document Imaging. . . Whether your law firm's area of practice is Personal Injury, Workers Compensation, Insurance Defense, Litigation or Transactional, to name just a few, Client Profiles is ready to provide a technology solution that is tailored to meet your specific needs.	See vendor website for more detail
Clio (888) 858-2546 www.goclio.com	SaaS (Software as a Service) Completely web-based, Clio is a practice management system that is specifically designed for solo practitioners and small law firms. Your important client data is securely accessible anywhere—from your PC, your Mac and even your iPhone.	Monthly Subscription Fee: <ul style="list-style-type: none"> • \$49/per attorney • \$25/per support staff
completeLaw (877) 283-9035 www.completelaw.com	From case management, client files, contacts, and calendars to time tracking, billing and accounting . . . integrates all major functions. . . syncs with Outlook . . . server or web-based document management . . . Law Web in the cloud. . . also available for Workers Comp . . . Personal Injury	See vendor website for more detail.
completeLaw – Web (877) 283-9035 www.completelaw.com	SaaS (Software as a Server) Set up a Virtual Office – Office without walls. All persons stay connected with each other from anywhere. Manage tasks, appointment, court appearances, billings, and documents from one place. Check-in check-out/version control—know who has	Monthly Subscription: <ul style="list-style-type: none"> • Start at #49 for solos; • Lease plans for 2-100 persons See vendor website for more detail

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SOFTWARE Name, Phone and URL	DESCRIPTION (according to vendor website)	PRICE
	document now! Create and Manage email.	
Credenza www.credenzasoft.com	Microsoft Outlook Add-on Turns Outlook into a professional management system . . . Organize client, matter . . . e-mails, contacts, appointments, tasks and notes . . . keep time entries . . . organize documents . . . make notes of phone calls . . . practice management utilities and reports.	Monthly Subscription Rate: <ul style="list-style-type: none"> • Credenza Basic – Free • Credenza Pro -- \$24.95/month
Courtview (585) 218-0420 www.courtview.com	For State and Local Courts. . . Prosecuting and Defending Attorneys . . . Justice Administrators and Public Safety Managers.” “CourtView CMS is our general case management system (CMS). For general jurisdictions we provide Justice MAX.	See vendor website for more detail.
Daylite Productivity Suite www.marketcircle.com/daylite/ (not a legal-specific software, but does have legal professionals template. For Apple computers.)	For Mac only This database template is designed to help attorneys and other professionals understand how Daylite can organize information and manage business processes more effectively. You can completely customize this template and enrich the content by adding information relevant to your practice. Law on the Mac = productivity.	Single License/\$229.95 and up <ul style="list-style-type: none"> • 5 Users/\$1,699.95 • 10 Users/\$2,649.95 • 25 Users/\$5449.95 • 59 Users/\$9,899.95 • Or 29.95/per user per month
Gryphon Legal Software (805) 456-2050 www.grysoft.com	<i>Complete</i> case and practice management software for solo practitioners and small to mid-size firms. Every aspect of the program is fully functional without any add-ons or extras.”...”between litigation and transactional mode.	\$19.95/mo. Subscription See vendor website for more detail
Justware (New Dawn Technologies) (877) 587-8927 www.justware.com	Government Case Management . . . The unique design and flexibility of our JustWare Solution Suite programs offer standalone or combined case management and workflow solutions that can be used individually by your courts, prosecutors, probation and parole, pretrial services and public defender agencies (also available in SaaS).	See vendor website for more details
Lawbase Synaptic Software (800) 569-3377	Law Base is a computerized Case and Matter Management System designed to increase the productivity and profitability of your office. Law Base is currently being used by thousands of law office personnel across the country, from solo practitioners to law firms with 750-plus attorneys to the legal departments of Fortune 500 companies to governmental agencies. . . Case Notes, Smart Folders, Docketing, Document Assembly, Contacts, Conflicts, Workflow	See vendor website for more details
LawStream (250) 247-9999 www.lawstream.com	For Mac and Windows/Vista Integrated computer program for managing time, money, contacts and other information in law office	\$800 per 1 st User (package pricing for more users)
LegalEdge (610) 975-5888 www.legaledge.com	Since its inception in 1989, LegalEdge has been providing legal case management software to Law firms, Corporate Legal Departments, Prosecutors (including adult and juvenile), Public Defenders, Juvenile, Attorneys General, City and County Attorneys and State and Local Government agencies . . . Knowledge management . . . Cross-Platform suite of Case Management Web Applications. These easy-to-use Case Management applications are built on an n-tier, 12EE core platform, which is highly scalable and fully customizable and offers full NET support.	See vendor website for more details
LegalFiles (800) 500-0537 www.legalfiles.com	Full-featured case and matter management system lets you organize all your contacts, documents, deadlines and data within a proven, flexible set of practice-specific windows and workflow that can be easily customized to your office. Our premier legal software offers	See vendor website for more details

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SOFTWARE Name, Phone and URL	DESCRIPTION (according to vendor website)	PRICE
	exclusive, seamless two-way integrations with Microsoft Outlook, Lotus Notes and Novell GroupWise, so you can save all your file related e-mails, calendars and tasks in one place, sharing this information with others and dramatically imposing workflow management.	
LexisNexis Firm Manager (800) 328-2898 www.myfirmmanager.com	SaaS (Software as a Server) You went to law school to be a lawyer --- not to manage the business of your practice. . . LexisNexis® Firm Manager™ provides a seamless interface to run the business of your office -- in or out of the office. Using this unique practice management system, you will provide superior service to your clients with confidence you have all your information instantly accessible.	\$44.99/per user per month
Lexis Nexis PC Law (800) 328-8298 www.pclaw.com	PCLaw™ is an easy to use foundational solution for managing matters, helping ensure compliance with trust accounting rules, tracking time and expenses, billing, payroll and more. PCLaw is a flexible tool fine-tuned for law professionals, and is the most widely used practice management software in North America. Join 30,000 firms just like yours who trust PCLaw to manage their practice.	\$950 1 st User license \$480/each additional user license (price incl. 1 st year maintenance plan)
LexisNexis Time Matters (800) 328-8298 www.timematters.com	Time Matters® software provides new ways to help law firms, legal departments and other organizations streamline operations to save you time and make your firm more efficient. Time Matters allows you to manage cases, contacts, your calendar, documents, communications, time tracking and their daily activities. Time Matters has been the choice of Law Firms, Legal Departments and other organizations for the past 20 years.	\$950 1 st User license \$550 each additional user license (price incl. 1 st year maintenance plan)
Livia Legal (888) 548-4248 www.livialegal.com	SaaS and Virtual Support System From LIVIA's highly secure and cloud based practice management platform, LIVIA delivers Comprehensive Practice Management Capabilities, State of the Art Portal Technology and Security; On-Demand Dedicated Professional Services and Support; Effective Client and Work Product Collaboration Tools."	See vendor website for more details
Needles (410) 363-1976 www.needleslaw.com	Customizable Case Management Software for law firms. Whether your law office consists of a solo practitioner or is a large law firm, Needles provides you with the tools necessary to manage matters efficiently, thus decreasing delays and increasing accountability and productivity . . . Needles' legal case & practice management solution delivers the technology required to transform your firm into a more efficient and profitable law office.	<ul style="list-style-type: none"> • \$1,000 1st 10 users • \$600 per user (11-20 users) • \$300 per user (21-40) • \$250 per user (41-250) • \$200 per user (251—500)
Orion (800) 305-5867 www.orionlaw.com	Orion is the only solution your law firm will need to centralize your Financial management, Firm Management, and Practice Management. . . Complete with powerful features such as e-Billing. Cost and Fee recovery, and Document Imaging. Orion offers you turnkey law firm management and reporting. You'll know exactly where you've been and where you're going (available in SaaS).	See vendor website for more details
Perfectlaw All-In-One Software www.perfectlaw.com	PerfectLaw® combines matter, contact, case and document management in the Front Office with full-featured Back Office timekeeping, billing and accounting to create the only fully integrated suite that doesn't require integration with other products for timekeeper calendaring and case management. With 30 years' experience in the legal software industry.	See vendor website for more details
Perfect Office ADC: Legal Systems (407) 843-8992	Offers a legal software solution for your firm starting at \$23/month. . . Case Management software adapts to your firm, not the other way around . . . Billing And Accounting . . . Bankruptcy/Foreclosure,	See vendor website for more details

IDENTIFYING THE BEST PRACTICE MANAGEMENT SOFTWARE

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SOFTWARE Name, Phone and URL	DESCRIPTION (according to vendor website)	PRICE
www.adclegal.com	Litigation, Insurance Defense, Personal Injury, Corporate Counsel, Social Security, Other Specialty.	
The Plaintiff (877) 202-0235 ext. 101 www.theplaintiff.com	Plaintiff's Attorney Software – Accounting and Case Management . . . integrates with QuickBooks . . . case management, document management, accounting, time and billing. . . calendar . . . forms	See vendor website for more details
Portal4Law www.portal4law.com (650) 396-7376	SaaS (Software as a Service) "Portal4Law is the one online practice management solution expressly designed to offer attorneys, legal departments, paralegals, and experts greater functionality at an affordable price.	<ul style="list-style-type: none"> • \$39.99/per user per month OR • \$36.66/user per month if purchasing 12 months
Practice Master (402) 423-1440 www.tabs3.com	PracticeMaster is a practice management system, in use since 1988, that is recognized for its flexibility, integration and customization capabilities. . . Integrates with Tabs3 Billing Software, Quickbooks®, Outlook®, Microsoft Word®, WordPerfect®, WORLDOX®, CompuLaw®, iManage® and HotDocs® Blackberry (using Outlook), Palm, Paperport.	Basic: <ul style="list-style-type: none"> • Starts at \$150/1st User • And \$95/ea. Add'l User Premier <ul style="list-style-type: none"> • Starts at \$395/1st User and • \$195/ea. Add'l User • \$65-150/1st User Ann'l Support
ProLaw (Elite) (800) 977-6529 www.elite.com/prolaw/	ProLaw software suite is designed to automate the practice and manage the business of law. Comprehensive features simplify, streamline and coordinate the work of attorneys and staff in small and mid-size law firms, corporate legal departments and government law offices. Built from the ground-up on a unified database, ProLaw combines case and matter management as well as time entry, billing and accounting capabilities within a single integrated solution.	See vendor website for more details
Prosecutor II (800) 237-0723 www.microfirm.com	District Attorneys, County Attorneys, Criminal Prosecutors, States Attorneys, Commonwealth Attorneys and other prosecutors performing criminal and civil case management.	\$1,100 per PC
Rocket Matter www.rocketmatter.com	SaaS (Software as a Service) Rocket Matter is a web-based, practice management and time & billing solution designed exclusively for the legal industry.	Monthly Subscription fees: <ul style="list-style-type: none"> • \$59.99/mo./1st User • \$49.99/mo./2-6th Users • \$39.99/mo./7-20th Users • 20+ Users
Saga Practice Manager (800) 222-3066 www.sagasys.com	Highly advanced practice and case management software program, using the latest and most robust technologies. From the ground up, the program was designed for Windows 2000/20003/XP/VISTA. It uses the award winning Microsoft SQL Server as its database engine, and allows scalability from a single user to 1001. . . including but not limited to Personal Injury, Medical Malpractice, General Negligence, Litigation, Real Estate, Matrimonial, Business Transactions, Criminal and Collections.	See vendor website for more details
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SOFTWARE Name, Phone and URL	DESCRIPTION (according to vendor website)	PRICE
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Amicus Accounting Gavel & Gown www.amicusattorney.com	Complete time, billing & accounting program developed specifically for law firms. (Links with Amicus Small Firm Edition or available as a stand-alone product.)	<ul style="list-style-type: none"> • \$399/1st user license • \$299/each add'l license
Amicus Premium Billing Gavel & Gown www.amicusattorney.com	Amicus Premium Billing adds billing, collections and trust to Amicus Attorney. It makes Amicus a complete practice management solution that manages both the professional and business sides of your practice. (To be used only with Amicus Attorney Premium)	<ul style="list-style-type: none"> • \$199/1ST user license • \$199/ea. Add'l user license
Bill4Time Bill4Time www.Bill4Time.com	SaaS (Software as a Service) Web-based time and billing software. . . Improve the way you run your business. Enter time and expenses on the go using your mobile phone, earn more money by tracking more time with accurate detail, and look professional and modern by sending invoices and getting paid electronically. Simple to use, easy to access.	Lite: <ul style="list-style-type: none"> • \$19.99/\$9.99 ea. Add'l user • Up to 20 clients and 30 projects Pro: <ul style="list-style-type: none"> • \$39.99/\$19.99 ea. Add'l user • Unlimited clients and projects.
Easy TimeBill Easysoft 800-905-7638 www.easysoft-usa.com	Easy TimeBill is desktop legal billing software to track and enter billable time, generate invoices, receive payments and perform bank accounting. Users can issue checks, make deposits and perform bank reconciliation while also tracking billable personnel and billable activities.	<ul style="list-style-type: none"> • 1st user license \$199 • Each add'l license \$99 Free tech support and upgrades (Seamless integration with EasyTrust for trust accounting, too)
Easy Trust Easysoft 800-905-7638 www.easysoft-usa.com (Use only for trust account)	A fully integrated Trust Accounting program to manage client funds. Print checks and generate client ledger balances and bank reconciliation reports.	<ul style="list-style-type: none"> • \$249 1 yr. license w/tech support OR • \$499 purchase/\$99 ea. Add'l (Seamless integration with EasyTimeBill for time and billing function, too)
Juris LexisNexis www.juris.com	Juris is the leading billing and accounting solution for mid-size law firms in the United States. It's a powerful tool that gives you the insight to increase both profitability and partner income. Juris can help improve your firm's financial performance with streamlined billing, accounting, advanced reporting and on-demand performance intelligence that are vital to making informed business decisions. Juris allows your firm to make better business decisions.	Contact vendor for price quote.
PCLaw LexisNexis www.pclaw.com	All-in-One Matter, Billing and Accounting Management Software Centralize all client/matter details—including contacts, key dates, emails, documents, billing and payments—so all members of the firm can quickly access the information they need. Capture billable time/expenses as they occur. Instantly run payroll with ADP® powered tools.*	<ul style="list-style-type: none"> • 1st new user license \$950* • Each add'l user license \$480* *includes annual maintenance plan <ul style="list-style-type: none"> • 1st new user \$600 Each add'l user license \$400

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SOFTWARE Name, Phone and URL	DESCRIPTION (according to vendor website)	PRICE
QuickBooks Pro (QuickBooks Online; QuickBooks for Mac) Intuit www.Intuit.com	Generalized small business accounting software; does have Professional Services version which gives the option to set up QuickBooks Pro for a legal specific environment. Call LOMAP for trust account setup instructions.	Pro: Windows or Mac • From \$229.95/single user Online: • From \$12.95/month
Sage TimeSlips www.timeslips.com	Designed to simplify even the most complex billing cycle, Sage Timeslips includes all the basics you need to record your time and expenses and invoice your clients.	Contact vendor for price quote.
Tab3; Trust Accounting System; General Ledger www.stilegal.com	Reliable legal time, billing and financial software that helps your law firm get bills out faster and increase productivity. Time/Billing, Trust Accounting, and General Ledger are sold as separate modules.	Contact vendor for price quote.
Tussman www.tussman.com	It tracks all your time and costs then automatically generates bills. It can also automatically create client costs from checks and charges (with the optional Accounting module).	Contact vendor for price quote.

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