Amicus Attorney News

The Official Newsletter of Amicus Attorney

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1. What's New @ Amicus Attorney?

Amicus Attorney® has teamed up with MediConnect.net™ - a leading online medical retrieval service - to help you save time, effort and money retrieving medical records in United States, Canada and Mexico.

Rapid Retrieve™ by MediConnect.net provides online ordering, statusing, updating, storage, and downloading of retrieved scanned records using a secure Web interface specifically for the legal industry.

Amicus Attorney Version 5.1.1 includes access to Rapid Retrieve technology and record retrieval service. With this integration, attorneys who require medical records can now request them simply and easily through their Amicus Attorney practice management software. This solution eliminates the need to make phone or in person requests, and also eliminates the lack of cooperation attorneys often encounter from doctors and hospitals.

The process of retrieving records through Rapid Retrieve is simple, fast and secure. Requests for medical records and checking the status of any request can easily be done. With one click of the Amicus Attorney DO™ button, information from the appropriate Client File in your Amicus Attorney is passed automatically to the service and you get immediate access to Rapid Retrieve. Your Client File information (name, address etc…) needed to conduct the record retrieval is automatically populated into the search fields of Rapid Retrieve. There is no need to enter the information twice.

MediConnect's Rapid Retrieve is currently the only records retrieval solution that is HIPAA (Health Insurance Portability and Accountability Act) compliant, which will further streamline the speed with which attorneys can successfully retrieve records.

This integration will allow you to convert medical record retrieval costs into billable expenses. The searches and records can be stored on your Amicus Attorney File and

amicusattorney.com

Amicus Attorney 5.1.1 users now have access to Rapid Retrieve on line medical record retrieval.

FREE DEMO

See how you can significantly reduce your medical record retrieval time and easily convert your record retrieval costs into billable expenses.

Pass It On!

Please feel free to pass this eNewsletter on to others who would be interested in receiving it.

By simply clicking on the "Subscribe Here" button, they will also start receiving it in their inboxes on a monthly basis.

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you can bill for every medical document retrieved.

For more information: http://www.mediconnect.net/amicus/faq/

For a FREE on-line demo of Rapid Retrieve: http://www.mediconnect.net/legal/

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Legal Laugh

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2. You Have to Try This!

Practical Tips and Tricks from Amicus Attorney Certified Consultants

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Keyboard Shortcuts are Not All Bad

by Debbie Foster

Sometimes keyboard shortcuts are difficult to remember, and not always time saving. Here are 5 keyboard shortcuts you can use in Amicus Attorney that are easy to remember, AND sure to save you time!

CTRL-R Amicus Attorney Copy Address Function
Many users of the Amicus Attorney Case Management system may be unaware of a great time saving feature within the program that will assist in the creation of letters and envelopes. When any contact is opened or highlighted (from the Contacts or the Files module) the copy address function will copy address details from Amicus Attorney to the Windows Clipboard and allow you to paste it into the word processor document. To invoke this function, simultaneously press "CTRL" and "R" keys, switch to your word processor (or anywhere else you need that person's name and address) and click the paste button on the toolbar (or press CTRL-V).

CTRL-D Amicus Attorney Generate a Document Function
Instead of going to Files > Generate a Document, or Contacts > Generate a Document, simply press CTRL-D, and there is your new document window!

CTRL-T Amicus Attorney Date/Time Stamp Function
In any field in which you can type, you can automatically insert the time and date with your initials. Where would you use this? The File Summary and General Notes fields of the File, the Notes page of a Contact Card, when you forward a phone message and insert your comments, etc. It sure beats either remembering to type that information, or trying to figure out when a note was added to the file. It will look like this: "DF - Feb 12 03 - 11:33PM - ".

CTRL-F Amicus Attorney Find Function
From anywhere in Files, Contacts, Calendar or Timesheets, press CTRL-F and the "find" or "search" window will appear. Type in the information you want to find, select which fields you want to search, and click OK or Search.

CTRL-SHIFT-D Amicus Attorney Date Calculator
So many users do not know that Amicus Attorney has a date calculator! No more counting and recounting dates on a paper calendar to make sure you will not incorrectly schedule a critical event! You can access the date calculator by pressing CTRL-SHIFT-D, or you can right click ANYWHERE on your background within Amicus Attorney(it looks

like green marble, unless you have changed it) and choose Date Calculator.

Compliments of:
Debbie Foster
In Touch Business Consultants, Inc.
Seminole, FL
phone: (727) 319-8281
fax: (727) 319-3561
debbie@intouchbc.com
www.intouchbc.com

Debbie Foster, of InTouch Business Consultants, is an Amicus Attorney Premiere Consultant. Debbie has assisted lawyers all over the country with Amicus Attorney implementations as well as other law office management software and technology related issues.

YOUR LEGAL LAUGH...

A lawyer defending a man accused of burglary tried this creative defense:

"My client merely inserted his arm into the window and removed a few trifling articles. His arm is not himself, and I fail to see how you can punish the whole individual for an offense committed by his limb."

"Well put," the judge replied. "Using your logic, I sentence the defendant's arm to one year's imprisonment. He can accompany it or not, as he chooses."

The defendant smiled. With his lawyer's assistance he detached his artificial limb, laid it on the bench, and walked out.

www.comedy-zone.net

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3. Special Product Feature

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Streamline Database Utility for Advanced and Client/Server Edition Users

The new Streamline Database function, available from the Database > Utilities menu in Amicus Administrator in Version 5.1.1 of Amicus Attorney, is a utility that looks at the Team Database (Team50\database\amicus.db) and attempts to purge any non-data records that are no longer required. Transactions that have already been processed by all Team Members, as well as any data that has been deleted but is still taking up space in the data file, are removed from the Team Database. In an Amicus Attorney Team with a lot of users, this can result in a considerable reduction in the size of the Database and consequently can often improve performance.

Note that if there are Team Members who have not logged in for quite some time (or that have never logged in), there will be a lot of unprocessed transactions that will need to remain in the database and therefore the Streamline

Database utility will not reduce the Main Team Database by as much as it could. We therefore strongly suggest that if you are planning to use the Streamline Database utility, you should:

1) Have all Team Members log in and then log back out.

2) Perform any outstanding synchronizations with Palm® and Microsoft Outlook and unpack any Secondary Office Briefcases.

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4. Legal Tips

Tips from Legal Industry Experts on How to Effectively Manage Your Practice

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How to Break Through the Time and Income Ceiling

by Edward Poll, J.D., M.B.A., CMC

Bill Minyard, a young family law sole practitioner, always seemed to be exhausted. He was making a living, bringing home $50,000 a year, but he wanted to break through to another level of income and feel more secure about his cash flow.

During a recent luncheon conference, he asked me, "How do I walk the line between meeting the needs of my existing clients and meeting my needs to increase my income? How do I level out the peaks and valleys of my business? Since I'm dealing with individuals in my family law practice, once I solve their problem, I'm back to square one looking for new clients. I'm already working 16-hour days. What can I do to improve my situation?"

This attorney had found himself caught in the classic lawyer's time trap: doing a good job for his clients while at the same time trying to attract more business. An added problem of this constant stress of running to find new clients also brings lawyers perilously close to the point where distractions and errors can result in malpractice claims or disciplinary actions.

So I suggested a strategy that should help this attorney increase his net income and provide for the safe continuation of his business. This advice can be useful to any sole or small-firm practitioner.

Planning and Goals

Like many attorneys, Bill Minyard didn't really have a business or overall operating plan for his law practice. He simply went to his law office everyday to work on client matters without a target or plan for where he wanted to be at the end of the month, the year, or his career. Without an overall objective, he was only putting in his time.

However, success requires more than that. Success requires a grand picture in your mind -- or a plan -- of where you're going and where you want to be at a certain point in time. Business planning is an idea and an action that can be accomplished regardless of the nature of the substantive area of your practice. This process applies to transactional work, as well as contingency litigation practice, such as personal injury and debt collection.

It's not uncommon for there to be a certain amount of fear associated with the thought of planning. But, rather than being afraid of planning, lawyers should actually feel confident, since they are trained to think logically about problems and solutions. Planning is merely one form of problem solving, and like all problem solving, the business planning process has certain steps. Here is an overview of the five business planning steps:

1. Prepare and Agree to the Plan

In a law firm, it is important that all the key players agree on the direction of the firm. If the partners are not clear about the overall goals as well as the specific objectives and strategies, then the planning process is bound to be sabotaged and of little use. Partners need to "buy in" to a plan.

Solos are not immune from this requirement either. They must get a spouse or "significant other" to accept the general direction of the firm. That is why the first element of any plan is to agree to make and abide by the plan.

2. Identify Goals

If you do not decide on your target income level and what type of practice you want, you will wind up with one reflecting whatever walks in the door. Serendipity or whim may make you successful, but it is doubtful. You need to decide what you want to be and what you want to do, both professionally and personally. Bill Minyard, as do you, needs to define not only his desired revenue but also the net income goal per year.

3. Create the Marketing Plan

Since your practice is dependent on customers, or clients, then getting them and keeping them is obviously critical to your success. A marketing plan helps you to see who these elusive people are and how to attract them to your door. Marketing is absolutely crucial to any business, and law practices are not exempt.

4. Create the Financial Plan

The financial plan is the culmination of all your earlier information gathering, thinking, and planning. The financial plan is the statement, in financial or monetary terms (the language of business), of your dreams and goals.

5. Evaluate and Revise the Plan

Good planning is not static; it is meant to be a guide that you can judge actions or outcomes against. If you begin to notice that a certain aspect of a plan is not working or needs some adjustment, change it. The beauty of a flexible plan is that it can be revised to better reflect the reality of your specific situation and to help you get to your desired outcome. Planning is an ongoing process. These five steps taken together make up a business plan or plan of operation, and the emphasis is clearly on the three that are the most important: setting GOALS, creating a MARKETING PLAN, and creating a FINANCIAL PLAN. Another way of saying this is: You need to decide where you are going and what you want to be (goals), you need to set into motion marketing actions to get you there (marketing plan), and you need to manage the financial resources to make it all happen (financial plan).

Compliments of:
Ed Poll
LawBiz Management Company
Venice, California
(310) 827-5415
edpoll@lawbiz.com
www.lawbiz.com

About the Author: Edward Poll, J.D., M.B.A., CMC, is a coach to lawyers and certified management consultant who shows attorneys and law firms how to be more profitable. Ed's latest book is Collecting Your Fee: Getting Paid From Intake to Invoice (ABA 2003); he is the author of Attorney & Law Firm Guide to The Business of Law, 2d ed. (ABA 2002); Secrets of the Business of Law: Successful Practices for Increasing Your Profits. To make suggestions or comments about this article, call (800) 837-5880 or send an e-mail to edpoll@lawbiz.com. You can also order a free e-zine or visit Ed on the web at www.lawbiz.com.

5. Spotlight On...

Highlighting a Feature of Amicus Attorney

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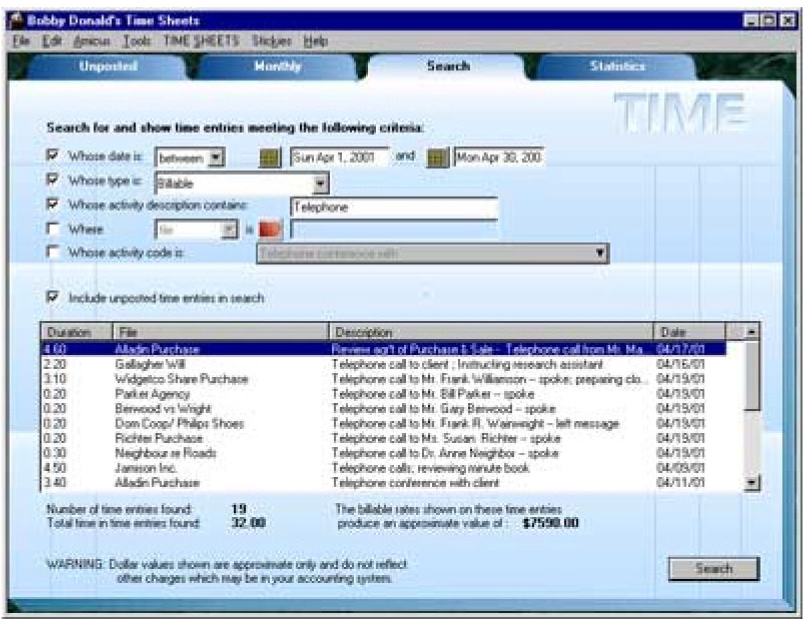
Time Sheets - Statistical Information About Your Practice

Ensuring your billable hours are all accounted for and tracked, we all know, is a must for legal professionals. This is easily accomplished with the Time Sheets feature of Amicus Attorney. With automatic time entries for all of your daily actions - including phone calls and e-mails - you'll be reminded to bill for everything you should. It is reassuring to know that you recorded and billed for your time, but do you know where all of that time is spent?

In every practice it is very important to know exactly where your time is being spent so you can understand the impact any particular client, matter or activity has on your overall practice. You need to know not only what you are doing most, but from where you are obtaining the majority of your billable time. Even if you don't bill for your time, being able to track it and see how it is spent allows you to be more productive.

Time Analysis:

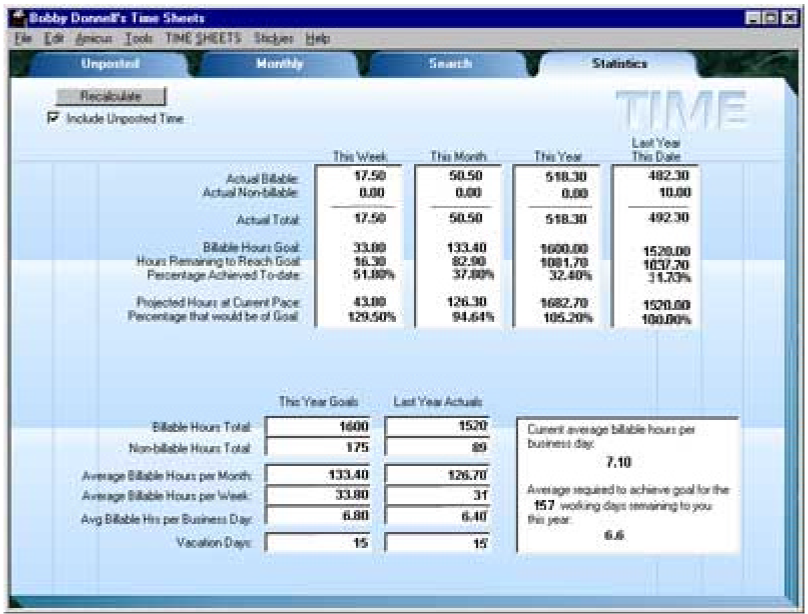
With the time analysis capabilities of Amicus Attorney, you can search through your time entries to create a variety of different cross-sections of your time. You can easily view where you spent your time for a particular client, all your time spent in court this year, all your time on the phone and much more. Time entries are all listed in detail so you can readily review them. Totals and dollar values let you analyze the impact any particular client, matter or activity has on your overall practice and billings. Amicus Attorney allows you to determine not only what you're doing most, but also what is making you the most money.



zoom

Billing Analysis:

Need to do some planning and goal setting for yourself or the firm? Amicus Attorney offers a range of valuable statistical information for this purpose. Statistics are clearly presented so you can measure your billing performance against your goals. You can review weekly, monthly and annual performance and compare with last year's totals to see if you are on track. Amicus Attorney will calculate your projected totals based on your current pace, and show what percentage they represent of the goals that were set at the start of the year. Easily determine how many hours a day you need to bill to achieve your goals.



zoom

The statistics setup allows you to specify the start of your fiscal year, and to enter your results for the previous fiscal year. Providing this information improves the overall accuracy of the statistics and of the comparisons being made with previous years. For those who begin using Amicus Attorney mid-way though the fiscal year, you can record the total billable and non-billable hours accumulated before you started recording your time in Amicus Attorney.

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6. FAQs - Frequently Asked Questions

Our Customer Service Team Provides Answers to Some Common Technical Questions

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1. Unable to Open the Data Source - Microsoft Word

Working with Microsoft® Word® within the document assembly feature allows users to automatically create documents using any information being tracked in Amicus Attorney. The following is an error message that some Microsoft Word users may encounter the first time they attempt to generate a document through Amicus Attorney.

When trying to generate a document in Microsoft Word, the following error messages appear: "Word was unable to open the data source"; "Run-time error 1826: Word was unable to open the data source".

Solution:

You must remove the "Text Files" driver for 32-bit ODBC:

1. From the Windows Taskbar, click the Start button, select Run, enter ODBCAD32 and click OK.

2. From the User DSN tab of the ODBC Data Source Administrator dialog, select Microsoft Text Drivers.

3. Click the Remove button. A confirmation dialog will appear on removing the text drivers.

4. Click Yes in this dialog.

5. Launch Amicus Attorney and attempt to generate a document again.

2. Updating Amicus Attorney and Your QuickBooks Link

Amicus Attorney V offers a dynamic link designed for QuickBooks® Pro and Premier. This works with U.S. versions of both QuickBooks 2002 and 2003. The following FAQ may come in handy for users who update or reinstall Amicus Attorney.

After updating their version of Amicus Attorney, users of the QuickBooks Integration may receive the following error: 'QuickBooks integration: error = 80040418, this application has not accessed this QuickBooks company data file before. The QuickBooks administrator must grant an application permission to access a QuickBooks company data file for the first time.'

This issue may also occur if you have reinstalled Amicus Attorney or applied a patch.

Cause:

Because the version and modified dates of the Amicus Attorney files have been modified by the update, you may need to re-verify that you wish to allow Amicus Attorney to be able to access your QuickBooks data files.

Solution:

You will need to re-grant permission for Amicus Attorney to access the QuickBooks company data files.

In QuickBooks 2002 and 2003, go to Edit > Preferences > Integrated Applications > Company Preferences. If the Allow Access column is unchecked beside Amicus Attorney, you will need to check it. If it is already checked, remove the checkmark and click OK, then go back into the preferences and re-check Allow Access.