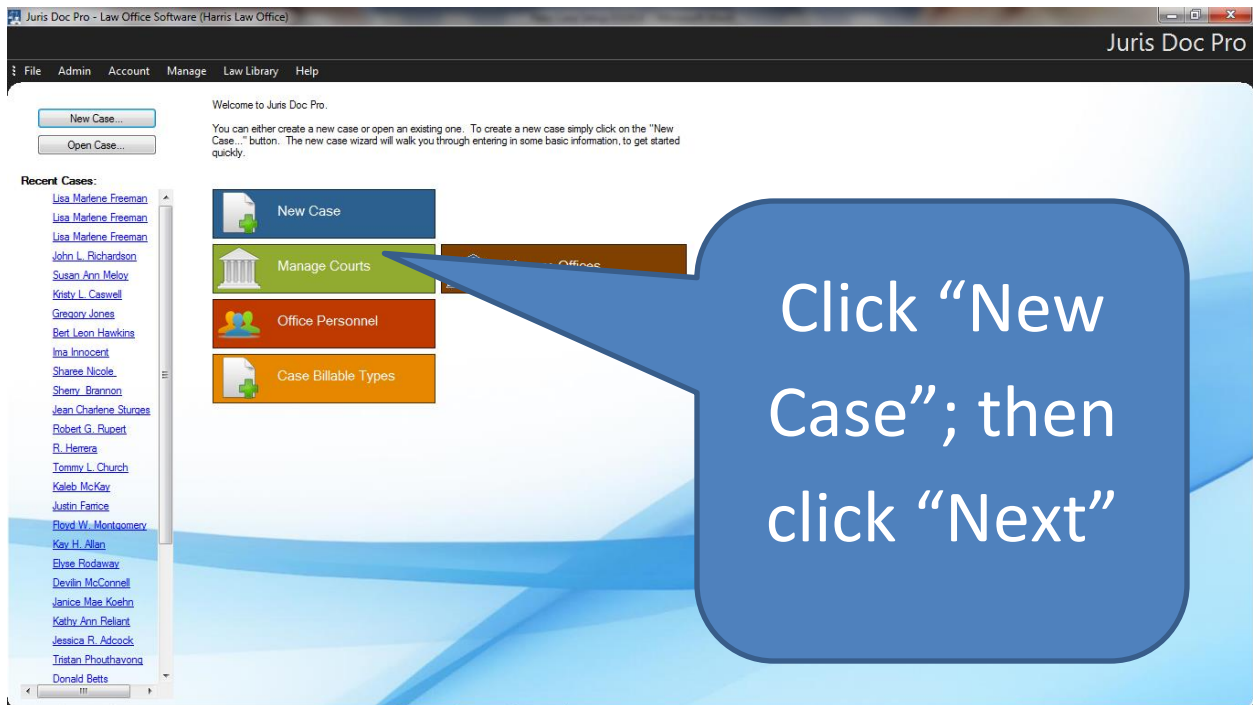


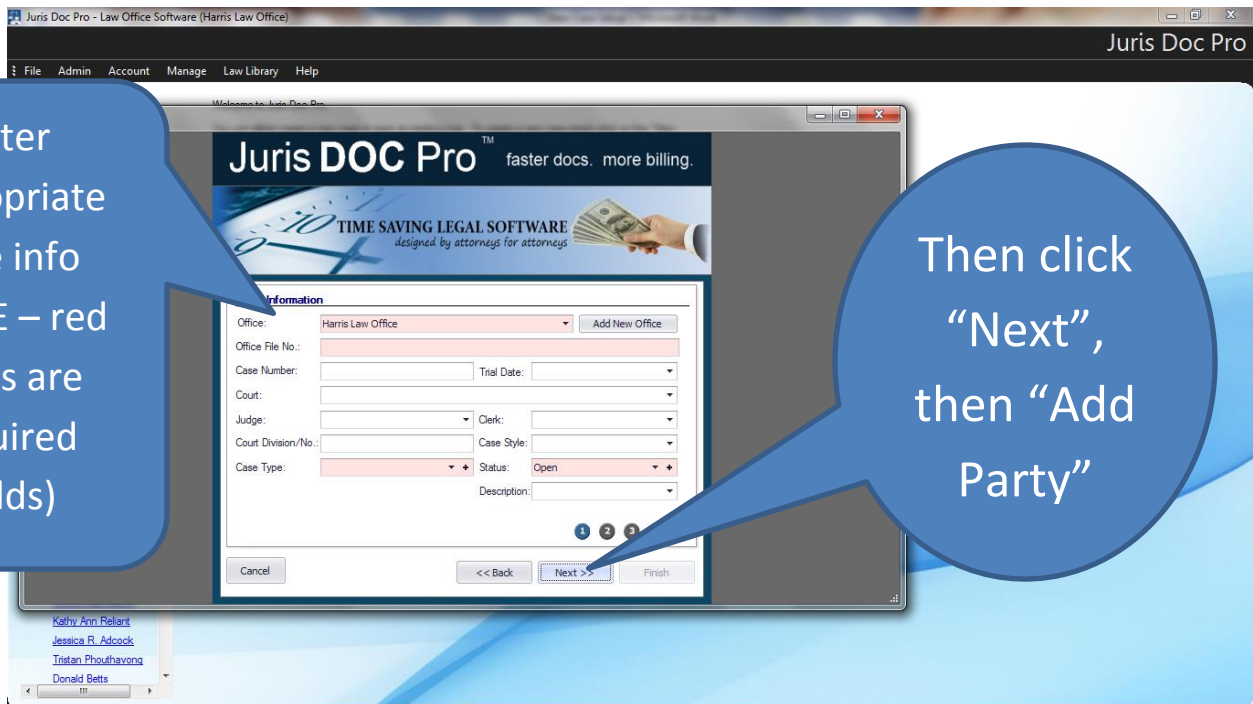
# NEW CASE SETUP

## 1. Click on “New Case”



The screenshot shows the main interface of Juris Doc Pro. At the top, there is a menu bar with 'File', 'Admin', 'Account', 'Manage', 'Law Library', and 'Help'. Below the menu, there are two buttons: 'New Case...' and 'Open Case...'. A 'Recent Cases' list is on the left, and a central panel contains four buttons: 'New Case', 'Manage Courts', 'Office Personnel', and 'Case Billable Types'. A blue callout bubble points to the 'New Case' button with the text: 'Click “New Case”; then click “Next”'. The background features a blue abstract graphic.

## 2. Enter appropriate info on Case interface screen

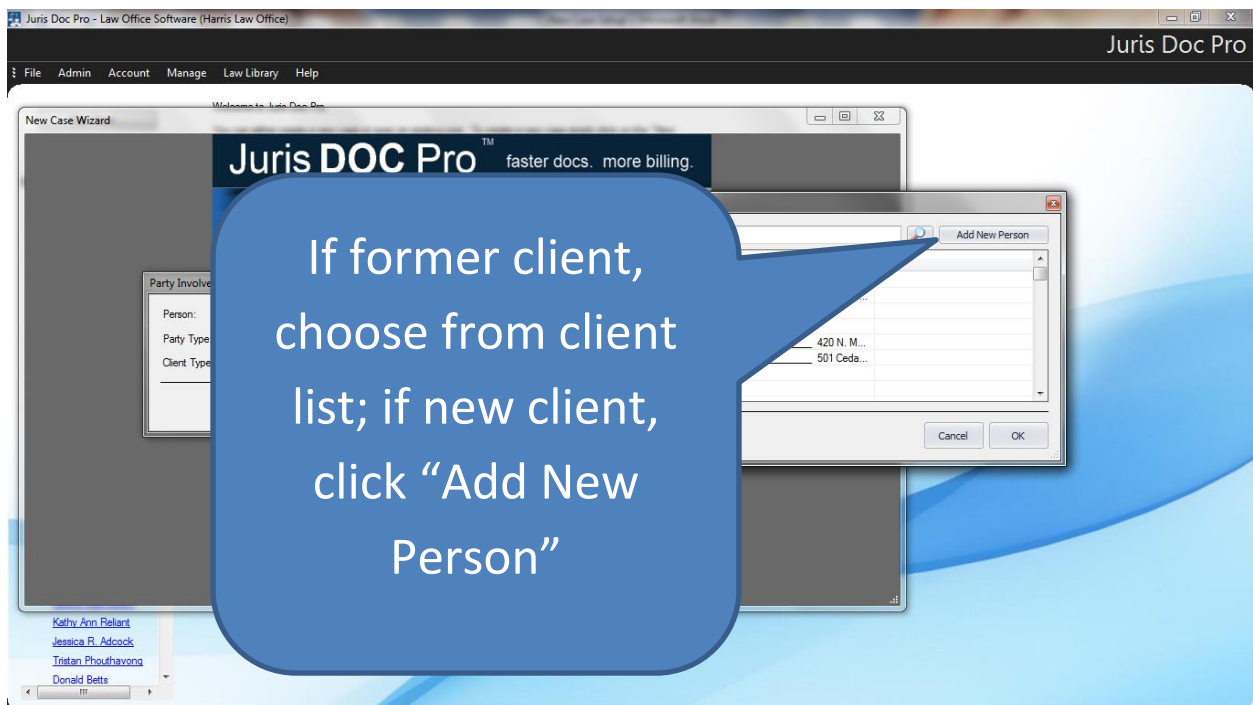


The screenshot shows the 'New Case' information entry screen. The title bar reads 'Juris Doc Pro - Law Office Software (Harris Law Office)'. The main window has a header with 'Juris DOC Pro™ faster docs. more billing.' and 'TIME SAVING LEGAL SOFTWARE designed by attorneys for attorneys'. The 'Information' section contains the following fields: Office (Harris Law Office), Office File No., Case Number, Trial Date, Court, Judge, Clerk, Court Division/No., Case Style, Case Type, Status (Open), and Description. A blue callout bubble on the left says: 'Enter appropriate case info (NOTE – red fields are required fields)'. A blue callout bubble on the right says: 'Then click “Next”, then “Add Party”'. At the bottom, there are 'Cancel', '<< Back', 'Next >>', and 'Finish' buttons. The background features a blue abstract graphic.

### 3. Click to add client



### 4. Choose client from client list, or, if new client, click “Add New Person”



## 5. Add appropriate info for party

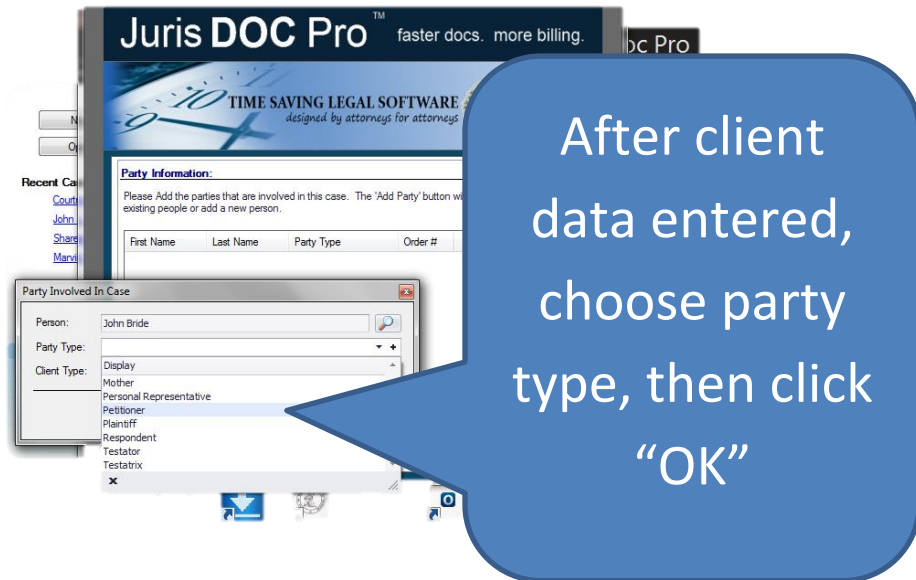
The screenshot shows the 'Person' form in the Juris Doc Pro software. The form is divided into two main sections: 'General Information' and 'Other Information'. The 'General Information' section includes fields for First Name (Cathy), Middle Name (Ann), Last Name (Reliant), Gender (Female), Date of Birth (9/10/1980), SSN (xxx-xx-3333), and Relationship (Mother). The 'Other Information' section includes fields for Contact Info, Address Info, Marriage Info, Employment, and Criminal Charges. There are also buttons for 'Add Party', 'Delete Party', 'Cancel', and 'Save'. A blue callout bubble points to the form with the text 'Add appropriate info for party'.

### NOTE:

All information does not have to be entered on the interface screen (in most cases it can also be entered on the form); but it is a good idea to at least enter some minimal data for the parties, attorneys, children, properties / debts, BEFORE preparing a law form

It is a good idea to EXPLORE and become familiar with each interface screen, to see where best to enter information (on the screen, or on the form), and the type of info that can be entered

**6. After client data entered, choose party type, then save**



**7. Next, on Party Information screen, click on "Add Party" to add info for opposing party.**



## 8. Make sure you choose “Opposing Party” as the client type



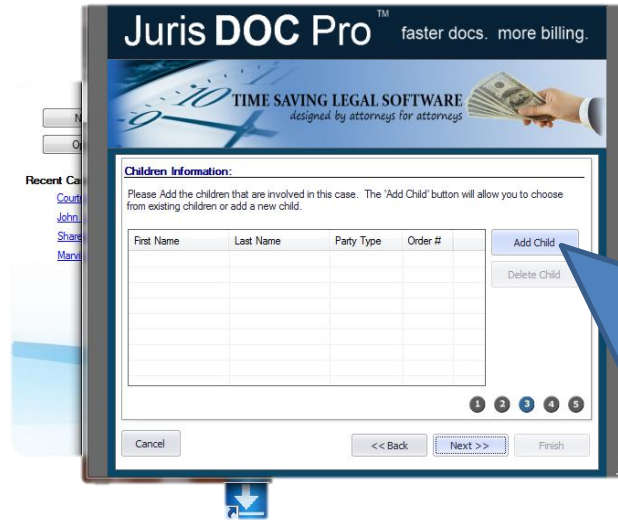
Choose  
“Opposing Party”;  
then click  
magnifying glass  
icon, and if party  
not on list, then  
“Add New  
Person”

## 9. Enter appropriate party info, then save

A screenshot of the 'Party Information' dialog box, showing the 'General Information' and 'Other Information' sections. The 'General Information' section has fields for: First Name (Penny), Middle Name, Last Name (Bride), Gender (Female), SSN, Date of Birth, Death, Children (1), and Relationship (Mother). There is a checkbox for 'Is Pregnant?'. The 'Other Information' section has tabs for Contact Info, Address Info, Marriage Info, Employment, and Criminal Charges. The 'Address Info' tab is active, showing fields for: PO Box, Street Address (456 Second Street), State (Kansas), City (Sedan), Zip Code (67361), and County (Chautauqua). At the bottom are 'Cancel' and 'Save' buttons.

Enter  
appropriate  
party info, then  
save; choose  
party type;  
then click  
“OK”; then  
click “Save”

**10. Enter child info if appropriate for case**



Click on  
"Add  
Child"



Click here to  
add new  
child

**11. Enter appropriate child info, then save**

**General Information**

First Name: Tommy  
Middle Name:  
Last Name: Bride  
Gender: Male SSN: xxx-xx-3344 (X allowed)  
Date of Birth: 2/18/2011  
Desired Name:  
Resides With: Petitioner  Is Adopted?

**Additional Information**

Birth Info | Contact Info | Address

Birth Hospital:  
Birth State: Birth City:  
Birth County:  
Birth Cert. No.:  
Birth Number: 0 Birth Type:  
Biological Father:

Cancel OK

Enter child info, then click "OK"

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**Child Involved In Case**

Please from e  
Child: Tommy Bride  
Party Type:  
Cancel OK

Recent Cases  
Court  
John  
Share  
Mane

Cancel << Back Next >> Finish

Leave "Party Type" blank; then click "OK"; then click "OK"

**12. Add attorney info**



Click "Add Party Attorney"; if Guardian ad Litem involved, click "Add Child Attorney"

**13. First add you as the attorney for your client**



Choose your client; then click on magnifying icon to choose attorney





If your name is on list of attorneys, highlight it, then click "OK"; if not, click "Add New Attorney"

#### 14. Enter new attorney info, if appropriate

Office is a required field; select your office from office list; if not on list, click "Add New Office" and complete office info; then complete appropriate attorney info; then "Save"

Then add info for other attorneys involved; then click "Next"



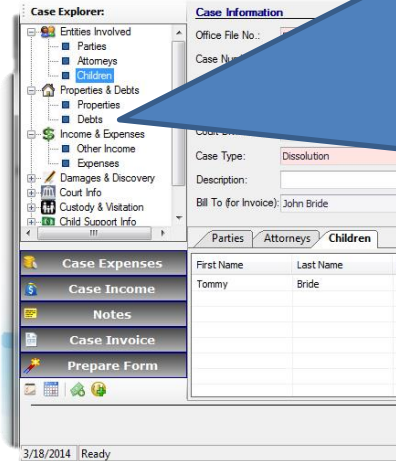
Choose involvement type, then click "OK"

**15. Enter info on properties involved, if appropriate**



Highlight property type, then double click and enter info on property; then save; if more than one item is for same property type, click on "Add Property" and enter info; when all property data entered, click "Finish"

**16. Enter additional info on case through interface screens available from Case Explorer, or on the forms directly, as appropriate**



Enter additional info on case through interface screens available from Case Explorer, or on the forms directly, as appropriate (ie, properties / debts; income / expenses; info regarding child custody, visitation or child support); then click "Save"

