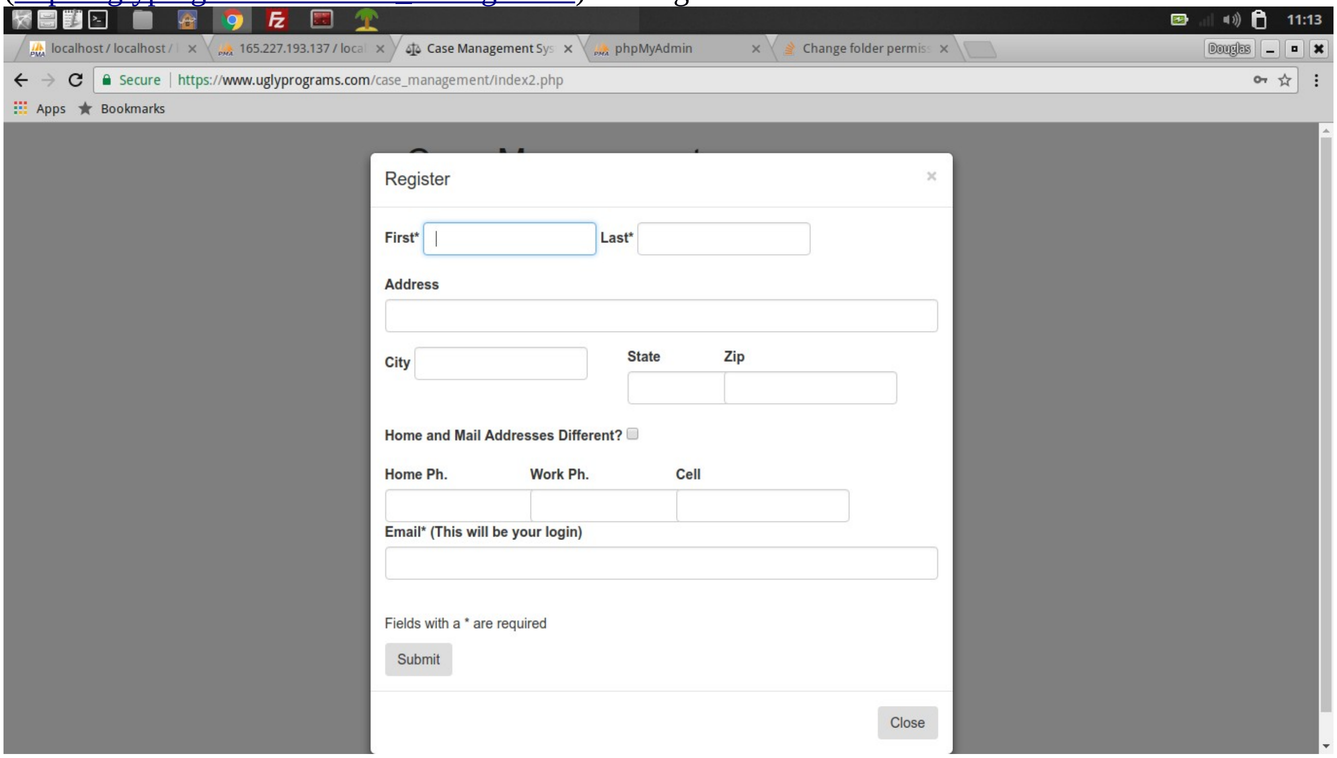
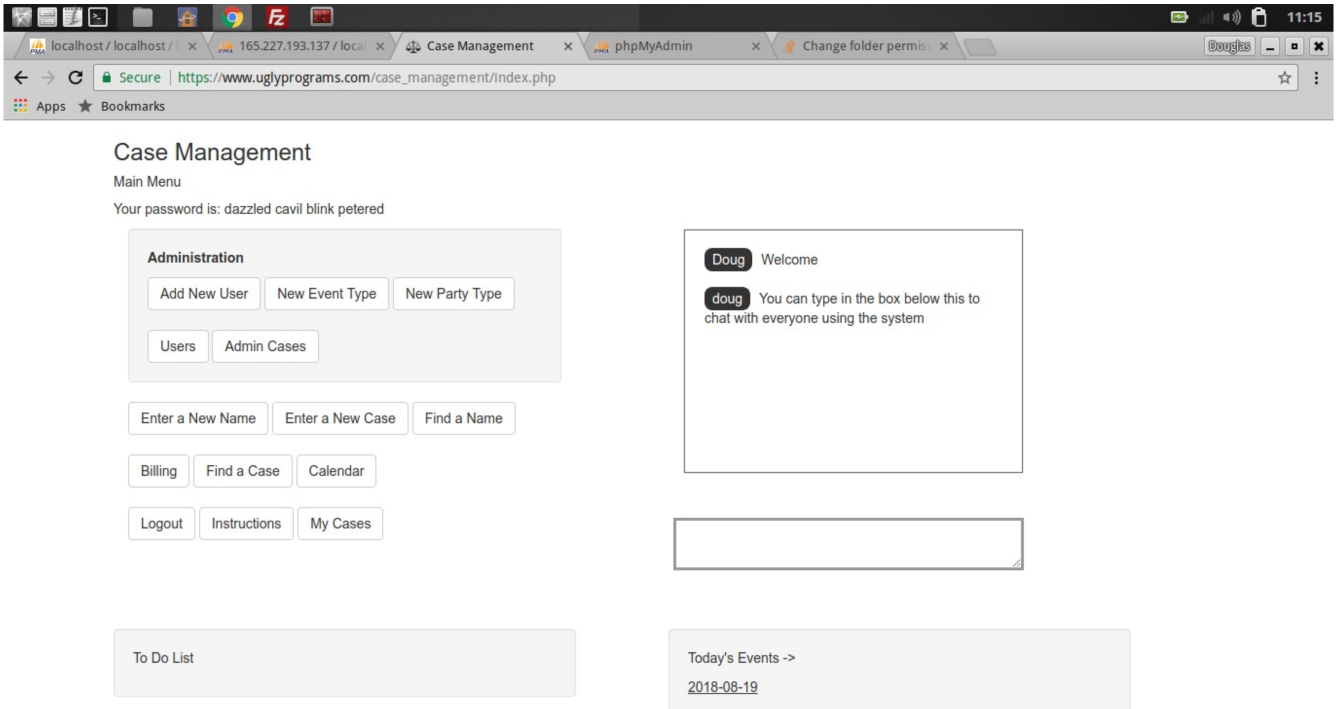
Last updated: October 19, 2018

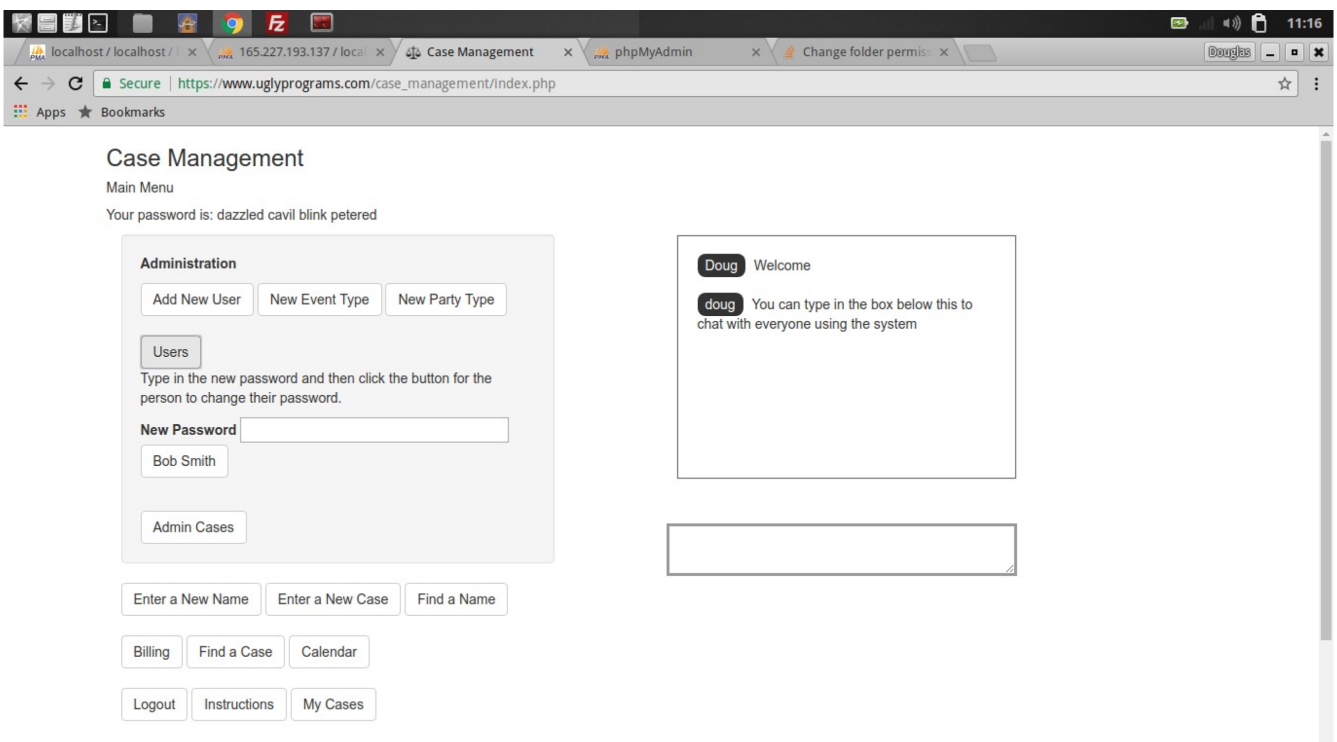
Notes on using my case management system. First you have to go to the website (http://uglyprograms.com/case_management) and register. See below:



Once you do this, you can login using your email and the password assigned randomly by the system:

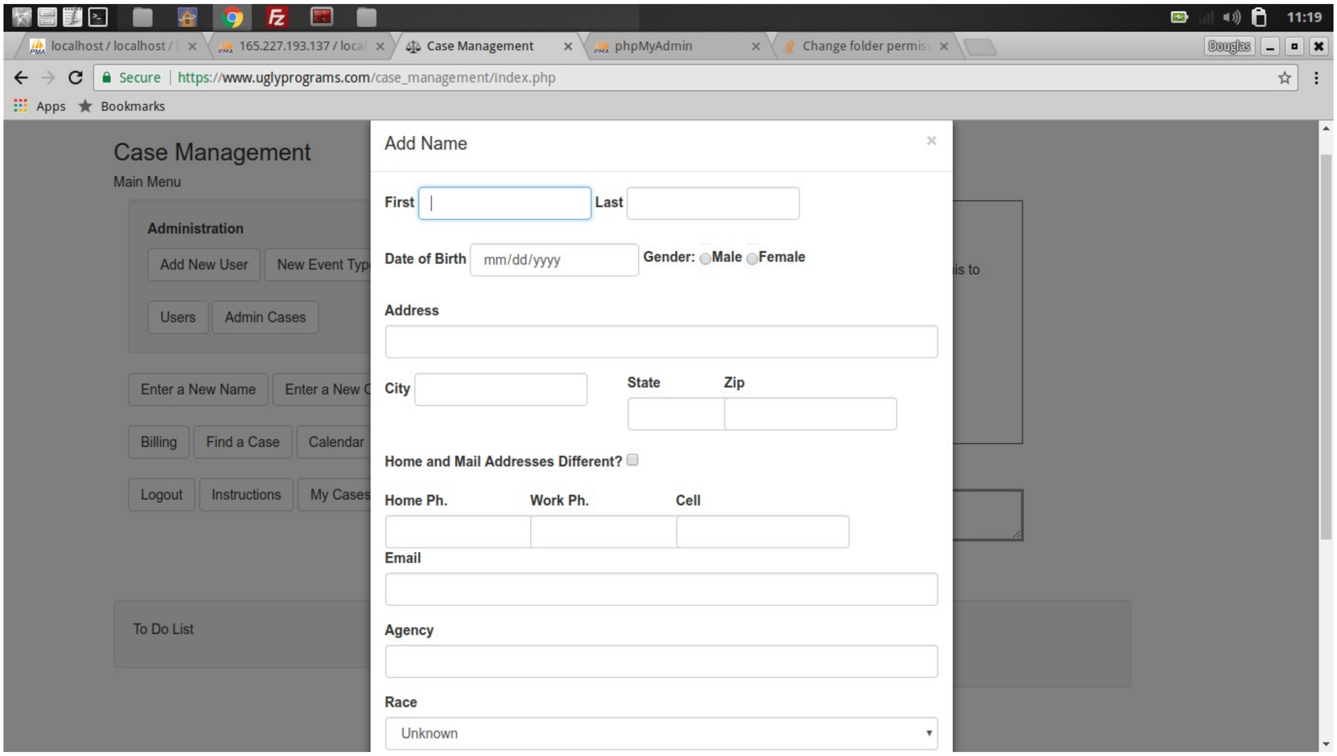


Note the password up at the top. It is four words separated by spaces. I recommend passwords of this nature as they are both secure and easy to remember. If you want to change the password, click on "Users" and type in the new password:

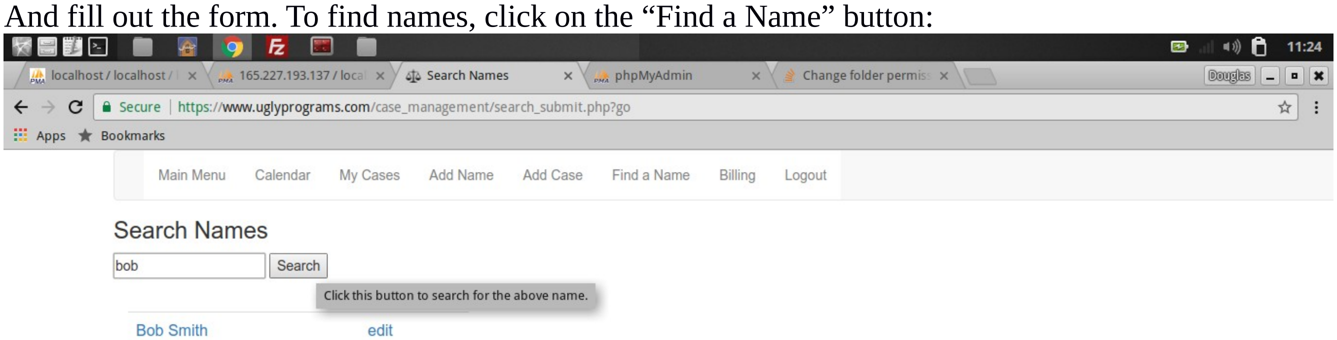


Then click your name. If you want to add other people who can see your cases and you can see theirs, then add a new user using the button in the administration section.

Right now, yours is the only name in the system. To add more names, click on the “Enter a New Name” button:

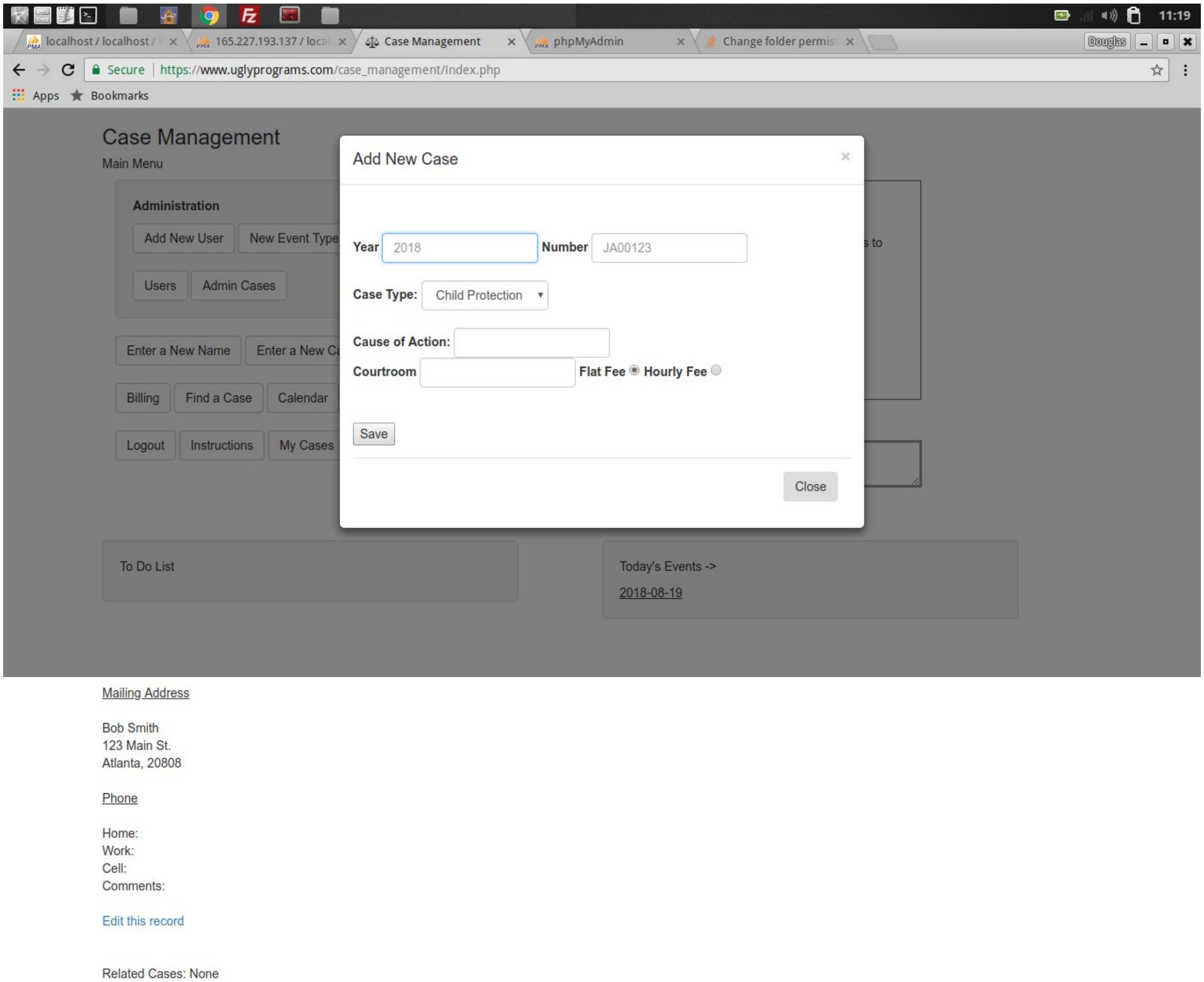


And fill out the form. To find names, click on the “Find a Name” button:

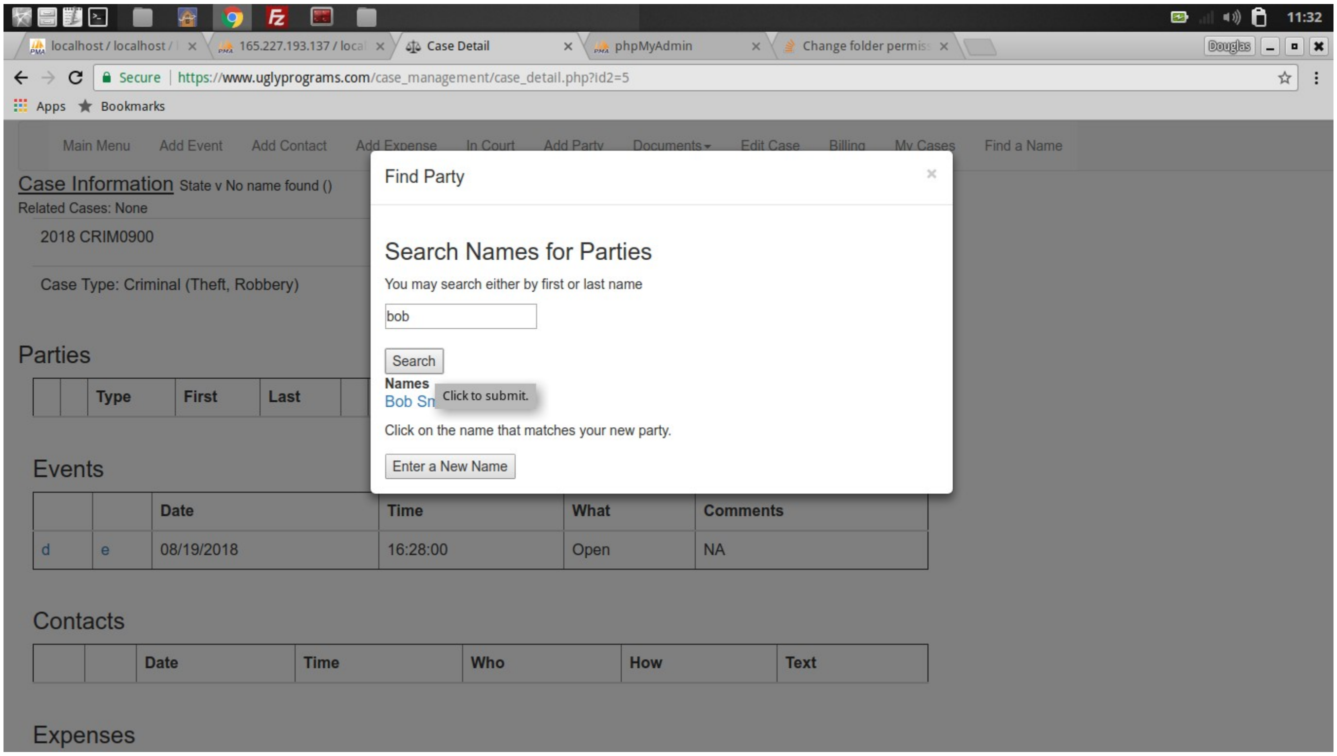


If the above name had any cases attached to it, they would show up here. You can search by first or last name. To edit the name, click on edit. To see more detail about the name, click on the name:
If the person had any cases, you would see them here as hot links. To add a case, click on the “Add

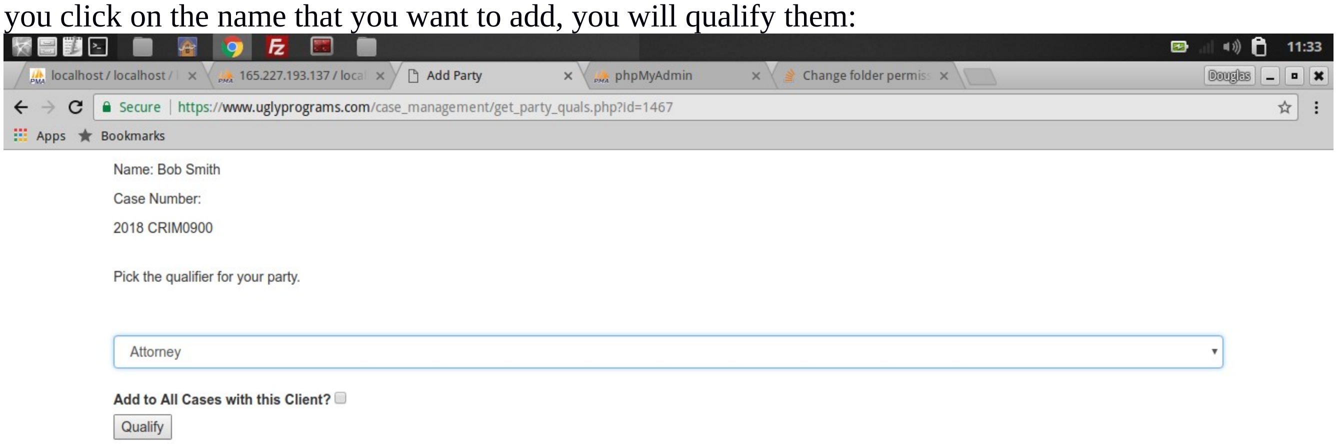
Case” link or button:



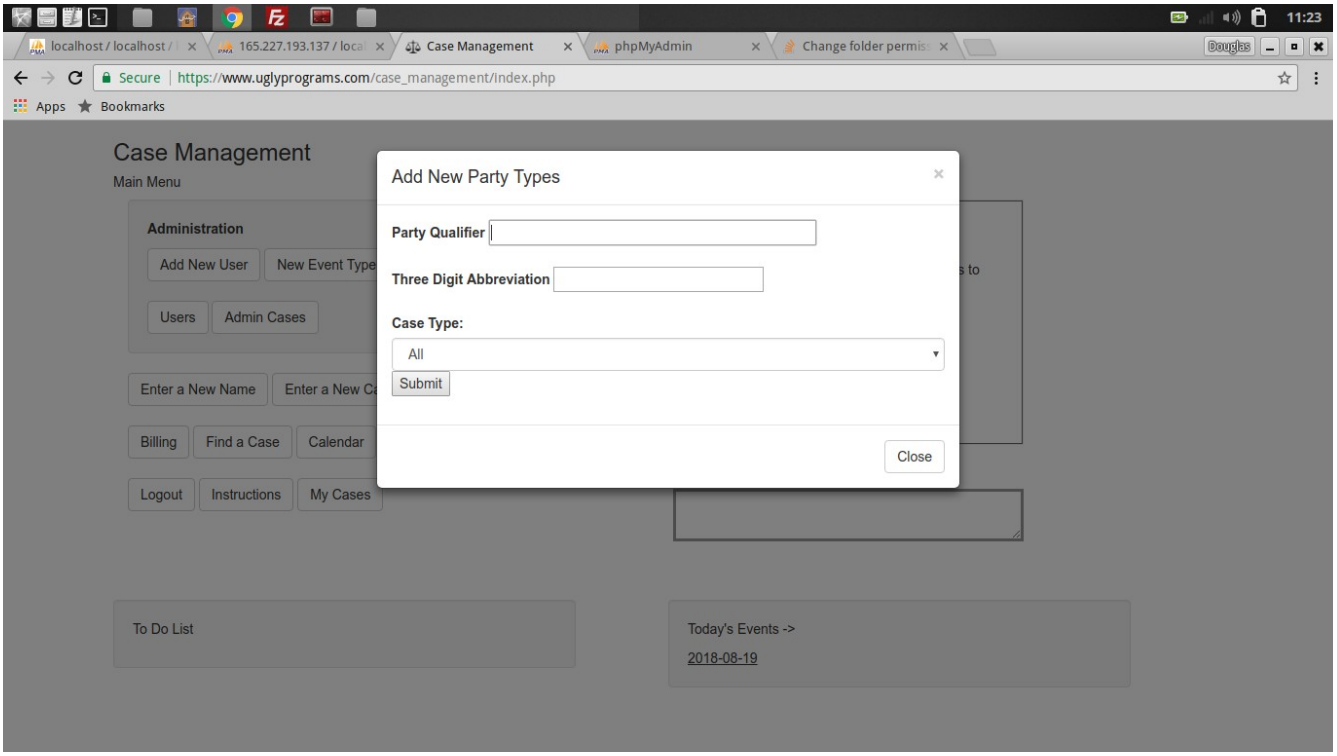
Once you enter a case, you will be taken to the case detail:
From here, you can add parties, events, contacts and expenses and billing. You cannot do anything without a client. To add a party, click “Add Party”:



Search for the name of the person you wish to add. If they are not in the system, you can enter a new name. I recommend entering all of the names first and then adding them as parties to the case. Once you click on the name that you want to add, you will qualify them:

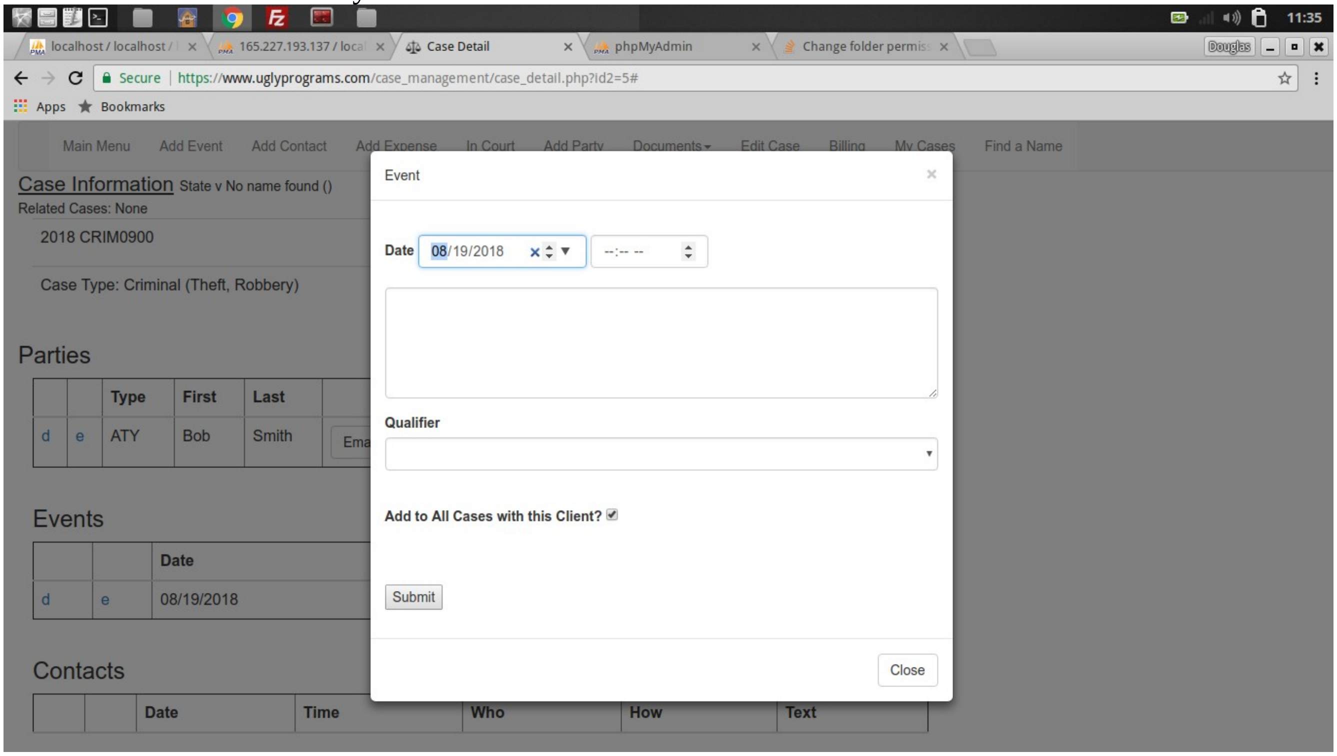


You are always “Attorney”. Make sure you add yourself to all of your cases. The client is always “Client”. To add more party types, go to the main menu and click “New Party Type”:

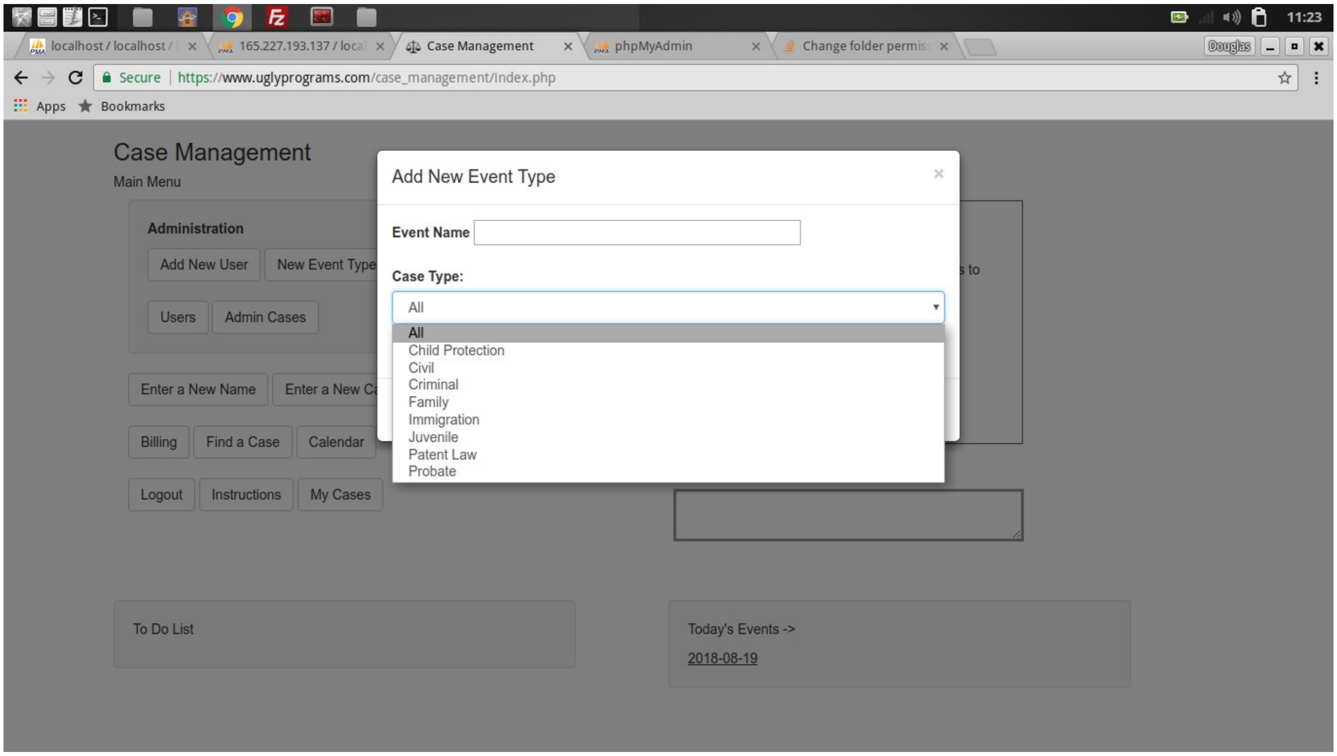


If it is a universal party type, use "All", otherwise use the particular case type it applies to.

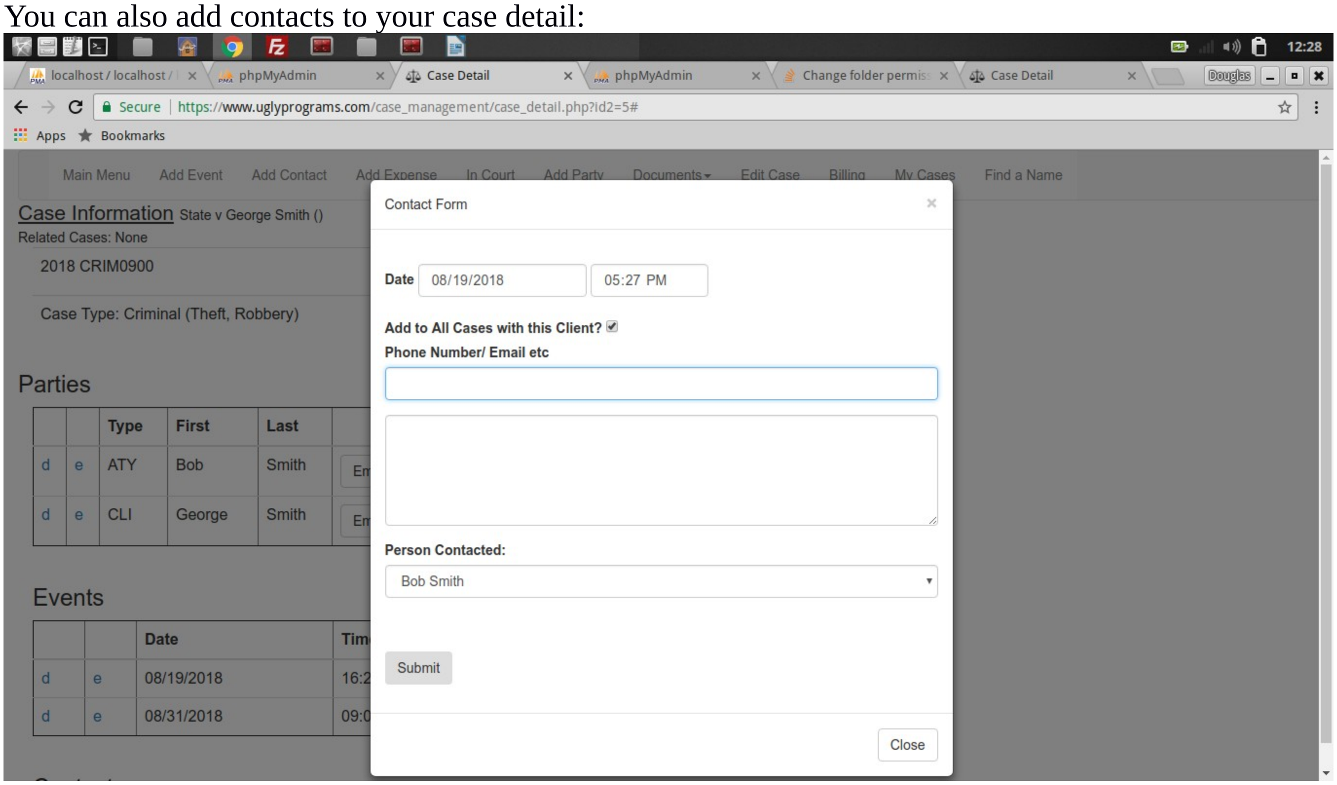
You can also add events to your case. Click "Add Event":



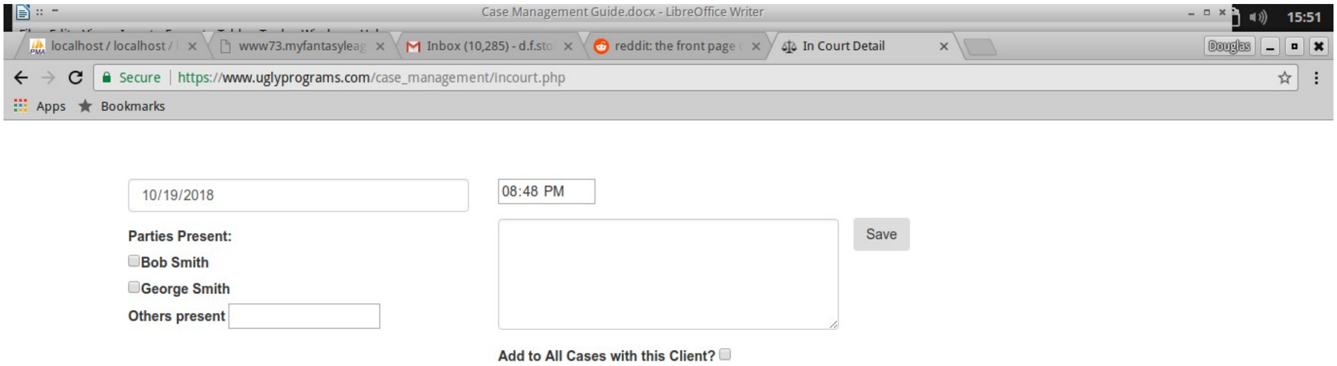
To add new event types, go to the Main Menu and click on New Event Type:
If you use the event type of "TODO" then you will be able to add To Do items which will show up on the Main menu.



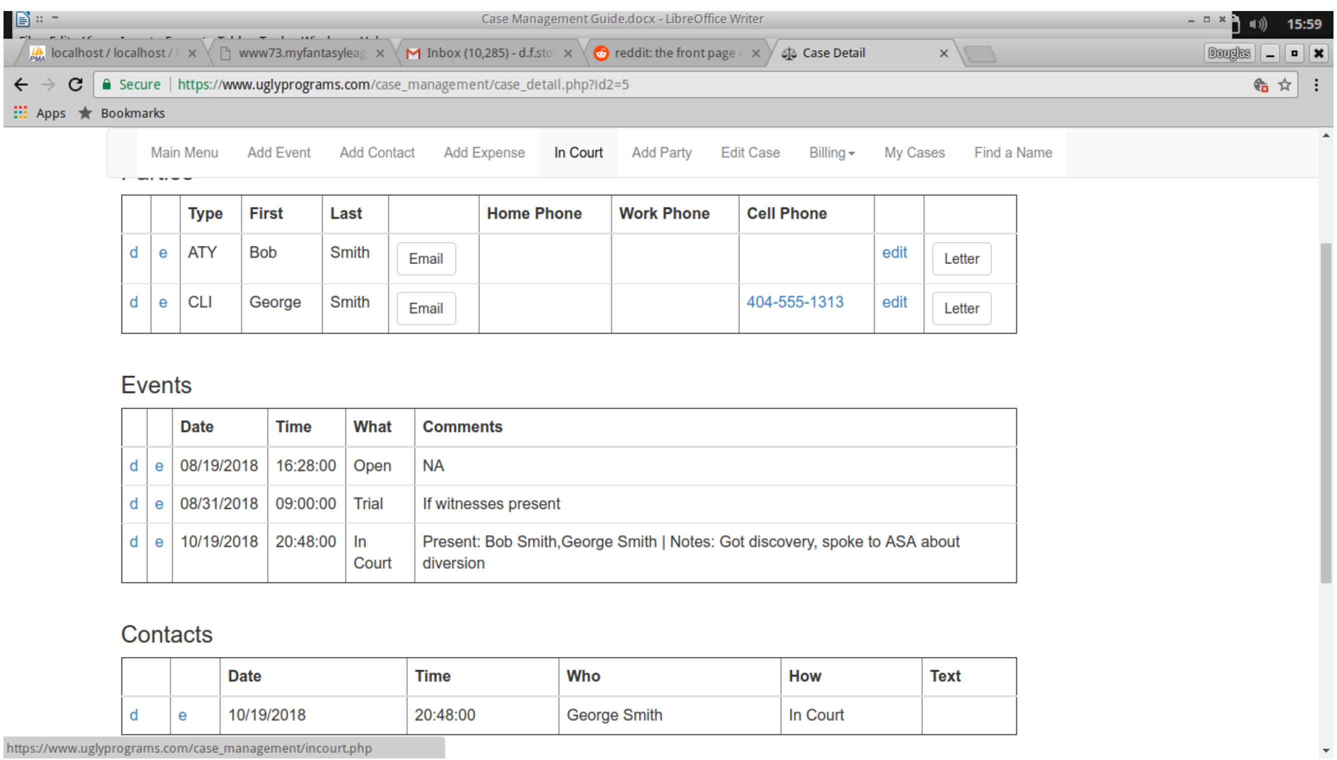
You can also add contacts to your case detail:

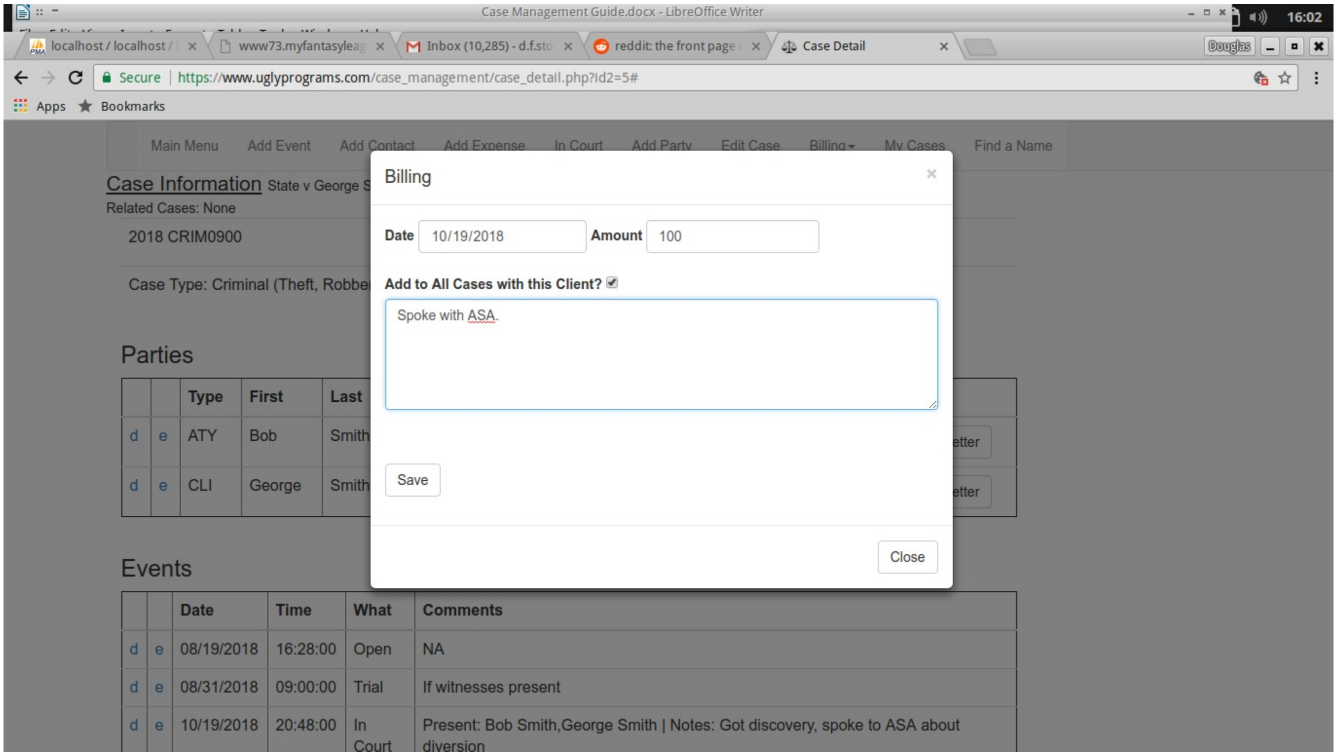


The type of contact is free form. If you have a client with more than one case, you can click the check box to add this contact to all of their cases. The “Person Contacted:” drop down box lists all of the parties currently associated with this case.

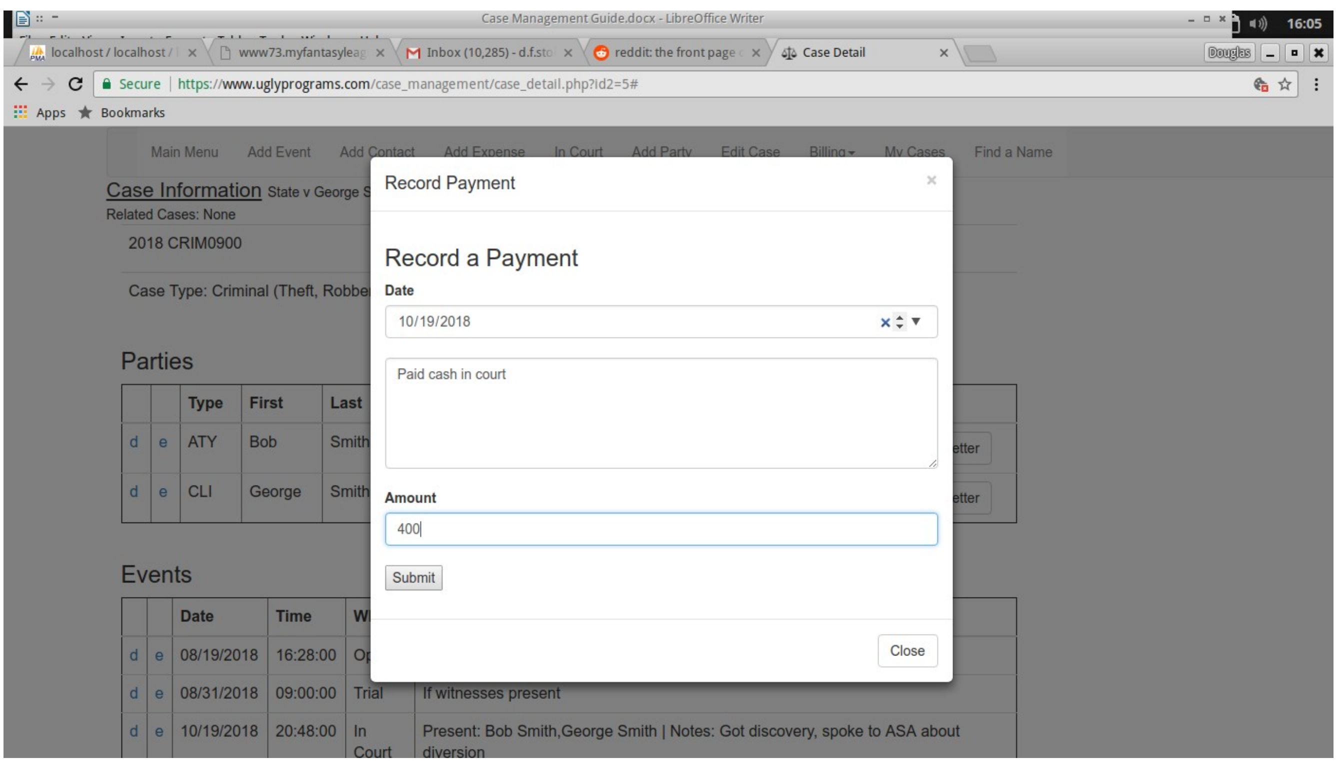


“In Court” provides a list of all the parties in the case so that you can detail out who was present at any given hearing and add notes. If you check that your client is present, it will also list a contact for that date as “In Court”. (See below) I could also see adding the ability to track admitted documents and type of continuance/hearing if that is desired.





You can add billing from the case detail page. If the case is a flat rate fee case, then you will add an amount. If it is hourly, then you will add a number of hours.



You can also record payments.

"My Cases" shows a list of all the cases that are in your name. If you have added other users, you will see them in the dropdown menu and you can see their cases. It will show all of the upcoming dates attached to each case. “Calendar” works similarly, but allows a monthly view of upcoming events. You can also email any of the parties or send them a letter. When you email a person, it will add that email as a Contact and then open your email system. Currently the letterhead is blank, but if you send me a copy of your letterhead, I can obvisously add that in.