FACT SHEET

CASE MANAGEMENT SOFTWARE FEATURES OF NEEDLES

Designed specifically for law firms, corporate legal departments and government law offices, Needles Case Management Software is scalable and highly customizable. Needles Case Management Software can help reduce errors, provides a way to organize client matter information and allows cases to be shared across offices. The program provides case status and tracking, daily checklists, custom intakes, document management, calendaring, conflict checking, email and contact management and internal messaging.

Case Types

Allows firms to handle any case types including: Adoption, Aircraft Accident, Asbestos, Auto Accident, Bankruptcy, Civil Litigation, Civil Rights, Collections, Commercial Litigation, Corporate, Defense Liability, Divorce, Family Law, Insurance Defense, Mass Tort, Medical Malpractice, Personal Injury, Product Liability, Real Estate, Social Security, Worker's Compensation, Wrongful Death and more. The system is easily customized and configured to the way a firm practices law.

Conflict Checking

Allows Users to automatically cross-reference names and other information entered into the database.

Case Status and Tracking

Provides the ability to track, organize and maintain all pertinent information as a case progresses, including important dates and deadlines. Information that can be tracked includes case status, individual or multiple statute dates, communications and expenses. Needles users may:

- Flag statutes by using a customizable checklist.
- Flag statutes with warnings.
- Track communications by date, staff number and customizable topics.
- Automatically generate task due dates.
- Track multiple Statute of Limitation dates.
- Track all provider information.
- Track expenses by payments, record notes, and liens, and create customizable settlement memorandums.
- Track multiple payments, record notes and liens, request checks, run reports, and quickly subtotal file costs.

Document Management

Users may easily and seamlessly create documents from Microsoft Word, Corel Word Perfect or Adobe. The Needles program provides a link to any letter, pleading, photograph, diagram, scanned item or other document that needs to be viewed in the case file. The program also allows users to merge documents directly from the checklist. manages reports and save them. It also manages documents scanned directly into the database.

Calendaring and streamlined docketing

Needles allows users the choice between an internal calendar or the Microsoft Outlook calendar. The internal calendar system provides views of daily, weekly and monthly appointments for individuals and staff. Users can easily run calendar reports to reflect specific criteria and appointments may be set for multiple staff members.

Email, internal messaging, Internet

Staff members may communicate both internally and externally using the Needles contact management system. The Needles program also integrates with any MAPI compliant email system.

Needles allows clients to:

- View incoming emails from external sources.
- Post attachments directly to client case files
- Post messages directly to client case files.
- Search 14 different ways in the database.
- Perform conflict checks
- Send E-mails and post them to client case files.
- Conduct retrieval and identification searches based on defendant, plaintiff, witness, and other criteria.
- Send mass emails to clients.
- Post internal messages directly to case files from the internal messaging system.
- Directly connect to Internet sites or other programs by using global customizable buttons.

Checklist (To-Do list)

The heart of the Needles system is the checklist, which is a daily task list that automatically updates as each file progresses. It enables the client to easily record completion of items, reassign tasks to accommodate staffing changes, generate or change task due dates, create single and repeating items and track multiple statute of limitation dates or warnings. By using the checklist, clients can organize, track, and maintain all case facts and other pertinent information, as well as important dates, questions, people, property, letters, notes and deadlines.

The customizable nature of the checklist lies in its ability to allows you to:

- ❑ Use your own codes and terminology.
- ❑ Easily record completion of items.
- ❑ Reassign tasks to accommodate absent employees.
- ❑ Generate or change task due dates.
- ❑ Create single or repeating items.
- ❑ Track multiple statute of limitations dates or warnings.

The checklist allows you to generate documents through Word, WordPerfect or Adobe. Clients may also create additional, auxiliary checklists for pre-litigation, litigation, etc.

Notes

In the Notes tab, each note is tracked by time, date, staff member and customizable topic. Case notes can be viewed in list form and sorted by any combination of staff, date, time and/or topic. Needles notes also utilize the spell checker on the Needles toolbar, which may be used to correct all text entered into the database.

Customer Relationship Management, (CRM), and Marketing
The Needles program, and database, may be used to enhance and support a company's marketing efforts. By using the Needles program a company may:

- ❑ Create customizable mailing lists for clients or providers.
- ❑ Create case and intake listing reports.
- ❑ Create intake note reports.
- ❑ Track referral information and create reports based on this information.
- ❑ Create and distribute mass mailings and mass E-mails.

Reporting Capabilities
The Needles program provides both standard reports and a user-defined report-writer. Reports may be created and run based on time, billing, invoicing and other criteria. Cases can be reviewed and analyzed by any one of the many standard reports that include monthly statements, checklist summaries, statute of limitations reports, case history and referral information. Choosing the desired tables and links, then sorting the information the way you would like it to appear on the report it allows users to easily create customized reports including case listing reports, intake listing or note reports, referral reporting, mass mailings.
The Needles database contains 85+ standard reports, including:

Checklist summary reports.
Statute of limitations reports.
Provider history reports.
Mailing Label reports.
Marketing reports.
Referring reports.
Management reports.

Customized reports can pull information from virtually any standard or user-defined field within the database. To create a report, simply choose your preferred tables and links and then sort the information..

Import/Export
The Needles' import/export feature revolutionizes your firm's abilities to refer cases by allowing users to transfer cases, or intakes, to other Needles firms.

Unique Features
- ❑ Mass Updating Features allow you to update information in many case files at once.
- ❑ Remote Access features allow users to access Needles, from a PDA or laptop, while they are out of the office.
- ❑ All Provider Information may be tracked, including: Documents, Notes, and Multiple Roles/Specialties, along with any created Primary/Associate Relationships (ie- one Primary Company, several Associate Employees, One Primary Agency, several Associate Adjusters, etc.)
- ❑ Scan Party and Provider Pictures directly into the Case File.

Software Conversions

Many of our new sales are conversions from other case management programs, but to date, we are unaware of any clients leaving Needles for another case management program

Data has been converted into the Needles format from many popular software systems, including, but not limited to:

- Abacus
- Access
- Act
- Amicus
- Case Explorer
- CasePro
- Casetracker
- CaseWizard
- CMS3
- Collosus
- The Legal System
- Microsoft Excel and Outlook
- Goldmine
- Lawbase
- Outlook
- PCLaw
- Perfect Practice
- Saga
- Time & Chaos
- TimeMatters
- Trial de Nova
- TrialWorks
- Tritech

Training and Technical Support
Clients may access the Needles support team during the standard Needles work week and after hours by pager, for emergency support. The Needles Support includes all program upgrades, access to yearly user group meetings and access to the Clients Only section of the website. Needles Trainers are recertified annually. Needles training can be conducted, on-site in your office, over the Internet using Webex or at the Needles training facility

System Requirements
Windows Millennium, NT, 2000 Professional or XP Home/Professional operating systems may be used to run Needles.
A Windows 2000, 2003, Novell Netware 5.x or higher server may be used in conjuction with the selected operating system.

Pricing
Please call Needles at 410/ 363-1976 for pricing information. Pricing is based on the number of concurrent users. A pricing calculator is available at http://www.needles.com/prices.php

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