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Tabs3 and Practice Master Premier, practice management software



I have been using billing and case management software for three months now. I use Tabs3 and Practice Master Premier (PMP). My goals for this software are:

Long Term: I need a conflict checking system. I need to lay the foundation for hiring an assistant – break down tasks, be able to better create a work-record and measure productivity.

Short Term: I need to be able to find and create documents efficiently. I need a billing and journaling system that prompts me to track my work as I perform it.

I want my practice to have three or so main cases types. I will have a template of folders for each of those case types. When I open a new file, I will be able to easily generate the documents associated with those case types. The program must be flexible enough so that I can customize everything.

Word Document Assembly (WDA) program functionality: In WDA I can refer to text fields in PMP. I can customize the fields in PMP so I can input any client information I choose. For example, I can create fields in PMP for the Judge's name, the case number and party names. Then in WDA I create a template that asks for this information. When I open the Word template the document is automatically assembled with the information in the client file. Hot Docs was supposed to do this but I could not figure how to create the question prompts that gather the information needed for the form. I find customizing my forms is much easier in PMP

Fee and Journal Records: I have learned quickly that if I cannot document my work then it is as if I have done no work. Also, documenting work is a great way to minimize the risk of facing a malpractice suit. First, I am less likely to misstep because I work from check lists and have a procedure. Second, if I am accused of something, I will be more likely to have the record in place to show what happened. In Outlook, when I send an email, PMP opens and I can make a record in the related client file. When I read an email, I can click a fee button or journal button and make a record in the related file. From my scanning Paperport software I can drag a scanned document to PMP. I can make notes from Adobe and Internet Explorer. I can link my computer to my phone and be prompted to time the call to a client. I am pleased with how well PMP integrates with all the programs I use. The prompting features give me hope that someday I will bill efficiently.

Coordination with Staff: This software is really targeted toward larger offices that have multiple staff members working on cases. The offices need to easily create work records and track productivity. I hope that my investment in learning this software will streamline my systems. Then when I am ready to hire an assistant, we can more easily coordinate as a team. I cannot handle the more complex cases without efficient, powerful systems in place. I view this software as an investment that will allow me to grow my practice.

Price: I paid \$786 for Tabs3, Practice Master Premier, and one year of technical support. I use PMP every day. I use the technical support about once a month. I have not yet used Tabs3 (next year I will though).

This subject is daunting. I make headway one step at a time. In the end, I will have an efficient, smart, low stress and highly-organized practice. I will be able to delegate work efficiently and focus my attention on work that I enjoy most.