

Wrongful Death and Minor's Claims

Version 5

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Puritas Springs Software

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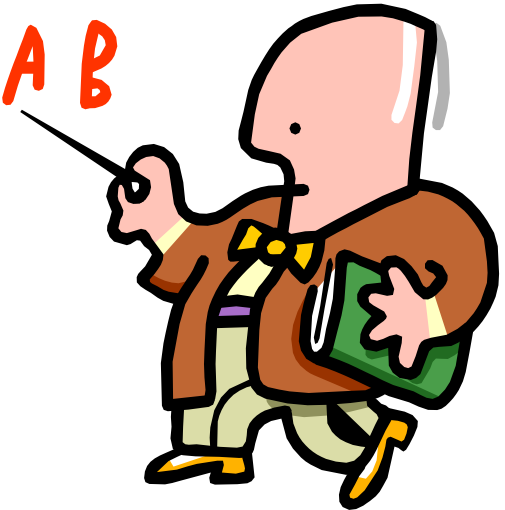
Getting Started **A B**

Wrongful Death & Minors Claims - Version 5 (WMinor5) is a 32-bit application that was designed to run in either *Windows* or *OSX* for *Apple/Mac*.

System Requirements. *WMinor5* requires a Pentium or equivalent processor with at least 32 MB of RAM. *WMinor5* is provided to purchasers as a downloadable executable of approximately 8 megabytes. *WMinor5* works best on a computer that is equipped with a SVGA video card capable of minimum resolution of 800 x 600 with a minimum of 256 colors and a compatible printer. Higher resolutions and color depth are recommended.

WARNING: United States Copyright laws protect *WMinor5* as the property of **Puritas Springs Software**. *WMinor5* contains a registered serial number that is located in various places within the software. Possessors of unauthorized copies violate Federal law.

Note that the files on the *Puritas Springs* disks are compressed. You cannot copy them to your hard drive manually. You must "install" them using the SETUP application.



Installing WMinor5



Overview

You install *Minor Claims & Wrongful Death—Version 5 (WMinor5)* to your computer by simply running the setupwminor5.exe file from our web server. You are always assigned a password for that purpose although passwords expire after a period of time. You will be assigned a new password if you need to reinstall the software and Version 5 is the current version at that time. Although the installation process is automatic, you can follow the steps on the next page just to make sure that the installation moving along smoothly.

NOTE ABOUT RUNNING APPLICATIONS: Many of the installation problems we encounter in technical support are the result of the user running programs in the background during installation. When you install *WMinor5*, you should make sure there are no applications running. Therefore, there should be no application buttons on the task bar. If you're unsure how to check what's running, we recommend rebooting your computer and doing the install right after you've rebooted and before you run any other application. Note that some applications execute automatically on startup, these too should be terminated before beginning the install. You may want to ask someone to help on this very important step if you're unsure about how to check for running applications.

Network Installations & Licensing

In the case of network installations, the types and implementations are diverse and we cannot give network-specific technical support although we answer questions about *WMinor5* to assist network administrators during installation and setup. Note that you must have a network license to be able to install *WMinor5* for use on a network.

Windows Installation Steps

- A. The **Preparing to Install** screen will appear briefly as *InstallShield* sets itself up to begin the installation process. Typically, you'll see a progress meter until the **Welcome** dialog appears. Click the **Next** button to proceed with installation. Click **Cancel** if you want to abort installation.
- B. The **Puritas Springs Software Licensing Agreement** appears in the next dialog. Click on the **I accept ...** option to accept the terms and conditions of the license, and then click on the **Next** button to continue with the installation. If

you do not agree to the terms of the Licensing Agreement, you will not be able to continue installing the program.

- C. Verify your user identification information and click the **Next** button. Unless you have a compelling reason to do otherwise, leave the **Anyone who uses this computer** option selected.
- D. You will now see the **Ready to Install** dialog. Click the **Install** button to begin the actual installation process. As files are copied and installation tasks are completed by the *InstallShield Wizard*, a progress meter will keep you informed as the stages of installation are completed.
- E. On some systems you may be asked to confirm the installation directory. By default the location is **C:\Program Files\Puritas\WMinor5**. We recommend leaving the default location in place and do not support installations to alternate locations.
- F. On some systems you may be asked to confirm the database directory. The “database” is the location where your client files will be kept. By default the location is **C:\Puritas\WMinor5\Files**. We recommend leaving the default location in place and do not support installations to alternate locations unless you have purchased the network or multi-user version of *WMinor5*.
- G. When installation is complete a **Installation Wizard Completed** dialog appears on the screen and you can click the **Finish** button.

Running The Program

When installation is complete, a *WMinor5* icon is placed on your desktop. You can start the program by clicking on the icon. You can also run the program in the conventional manner by clicking on the **Start** button in the lower, left corner of your screen, then click the **Programs** or **All Programs** item, then the **Puritas Springs Software** submenu, and finally click on the *WMinor5* item.



Entering Information



A Minor's Claim Tutorial

When you start *Wrongful Death and Minor's Claims (WMinor5)*, you see the Main Window. The Main Window gives you access to a blank client probate form set (blank except for any information present in the DEFAULT file). In particular,

you see the **General Information Worksheet** because it is the logical starting place. Regardless, you can display and complete *any* form or worksheet in *any* order.



The <TAB> Key

Use the <TAB>  key to move from field to field. When you press the  key, focus moves from field to field allowing you to complete the return. It's also very helpful to know that <SHIFT><TAB> moves backwards from field to field. This is especially handy when you've overshot your destination field and wish to go back without cycling through all the fields on the page.

Other Notes

As you complete the various forms, you won't go too far before you notice that you cannot tab to every field. *WMinor5* calculates many answers based on information you entered on the worksheets. The name of the estate and case number are good examples. When you enter them on the **General Information Worksheet**, they appear automatically on all the other forms and schedules.

This is also true for financial information. You enter data such as settlement proceeds and expenses in the **Accounting Worksheet**, and the relevant figures appear automatically on the desired forms. Spouses, children, parents and are handled similarly. You enter all related information in the **Kin/Claimant Worksheet** and their names and addresses appear automatically on the designated forms.

You'll find that you can enter information in any order you want, but we've found that developing a pattern of data entry procedures works best — that pattern is set out in the tree view of the **Main Window**. We recommend following those steps.




This tutorial uses a minor's automobile accident injury claim as an example. This tutorial takes you keystroke by keystroke through the steps required to complete a minor's automobile accident injury claim from beginning to end. Note that the tutorial

follows a file on your disk named SAMPLE.WM5. If you simply wish to follow the tutorial without doing the typing, you can load the SAMPLE file and continue reading this tutorial.

General Information Worksheet	
Caption –	
Name of Estate:	Robert T. Sample
Judge/Subtitle:	Presiding Judge Philip T. Law
Probate Judge:	Philip T. Law
County:	Cuyahoga
Case No:	09-765432
Decedent/Injured Minor –	
Name:	Susan R. Sample
Date of Death/Injury:	12/7/2009
Street Address:	1234 Main Street
City:	Cleveland
State:	Ohio
Date of Birth, if minor:	7/4/2001
Post Office:	
County:	Cuyahoga
Zip Code:	44111
Attorney for Estate –	
Name:	Ward F. Stone
Street Address:	17140 Lorain Avenue
City, State ZIP:	Cleveland, OH 44111
Phone No.:	216-251-5555
Supreme Court Reg. No.:	1234567
Applicant/Fiduciary for Estate –	
Name:	James T. Sample
Street Address:	1234 Main Street
City, State ZIP:	Cleveland, Ohio 44111
Phone No.:	330-278-3252
Title:	Father


Step 1. Complete the General Information Worksheet.

When you first start *WMinor5* or select the File|New command, you get a blank set of probate forms on which to begin working. The logical place to begin working is the General Information Worksheet. This is where you'll enter common information like the name of the estate and the case number. Once entered on the General Information Worksheet this information appears automatically on all the other probate forms.

Let's start! The cursor is blinking in the "Name of Estate" field. Type "Robert T Sample" and then press the <TAB>  key. Pressing the  key takes you to the next field—"Judge/Subtitle." In that field type: "Presiding Judge Philip T. Law" Note that not all counties use a subtitle line, so if your county doesn't, you should leave this field blank. Complete the rest of the General Information Worksheet as shown below. Remember to press  to move from field to field.

Field	Answer
Probate Judge	Philip T. Law
County	Cuyahoga
Case No	09-765432
Decedent/Injured Minor:	

Name	Susan R. Sample
Date of Death/Injury	December 7, 2009
Street Address	1234 Main Street
Post Office	skip this field by pressing <TAB>
City	Cleveland
County	Cuyahoga
State	Ohio
Zip Code	44111
Date of birth	July 4, 2001
Attorney:	
Name	Ward F. Stone
Address	17140 Lorain Avenue
(Address line 2)	Cleveland, Ohio 44111
Phone No.	216-251-5555
Sup Ct No	1234567
Applicant/Fiduciary:	
Name	James T Sample
Street Address	1234 Main Street
(Address line 2)	Cleveland, Ohio 44111
Phone No	330-278-3252
Title	Father
Co-Applicant/Co-Fiduciary:	
Name	Judy S Sample
Street Address	1234 Main Street
(Address line 2)	Cleveland, Ohio 44111
Phone No	330-278-3252
Title	Mother

After you press  on the last field, your screen should jump back to the top. It should look similar to the one shown on the preceding page

Step 2. Name and Save Your File.


Up to this time the title bar at the top of the *WMinor5* window tells you that this new file has no name. Having completed the **General Information Worksheet**, you should save your work by using the **File|Save As** command. Do this by clicking on the **File** menu and then selecting the **Save As** item. When you are asked for a file name, use any legitimate name. Keep in mind the following prohibitions about files and their names:

- 1 **Do not change *WMinor5*'s default **WM5** extension.** In other words, if you're using intending to use the name "Jones," just type JONES and don't use a period or alternate text after the period.
- 2 **Save your **WM5** files in the default directory (C:\Puritas\WMinor5\Files).** When there is a problem or confusion regarding saving files, it is usually related to not following our admonition about using the default directory for your **WM5** files.


Step 3. Enter all spouse, children, parent, next of kin survivor and claimant information in the **Kin/Survivor/Claimant Worksheet**.




You can display the Kin Worksheet by pressing  , or you can display the Kin

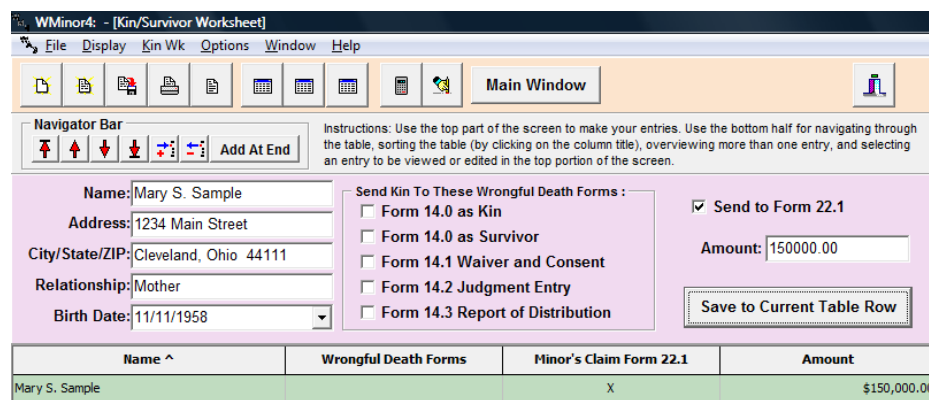
Worksheet by going to the Display menu, open the Worksheets submenu and select Kin. The Sample file that is included with *WMinor5* has various individuals entered into the worksheet, however, when you start your own file the worksheet is empty and ready to accept your first entry.

- When the worksheet appears, the focus should be in the left-most, high-lighted Name field.
- Press  to move to the next field — Address. The next few fields are shown below. To follow the Sample, you would complete the five fields as follows:

Name: Mary S Sample
 Address: 1234 Main St
 City/State/ZIP: Cleveland, Ohio 44111
 Relationship: Mother
 Date of Birth: 9/10/58

As usual you use the  key to move from line to line. Of course, you could also click your mouse on the desired line and start typing.

- When you're finished with the fifth line (Date of Birth), press  to move to the radio button group box (Wrongful Death). This set of buttons is only used if the case is a wrongful death case. It contains a list of checkboxes for those forms to which you'd like the individual's name/address info to go. In the Sample we skipped this column.
- Click your mouse or press  to move to the next field or column (Minor's Claims). This column is only used if the case is a minor's claim. It contains a single checkbox for Form 22.1 – Waiver & Consent. In the Sample file we checked this box.
- Click your mouse or press  to move to the last column - Amount. Enter \$150,000.00. Note it is not necessary to enter the dollar sign (\$) or comma (,).



The screenshot shows the WMinor4 software interface. The main data entry area contains the following information:

Name: Mary S. Sample
 Address: 1234 Main Street
 City/State/ZIP: Cleveland, Ohio 44111
 Relationship: Mother
 Birth Date: 11/11/1958

Send Kin To These Wrongful Death Forms:

- Form 14.0 as Kin
- Form 14.0 as Survivor
- Form 14.1 Waiver and Consent
- Form 14.2 Judgment Entry
- Form 14.3 Report of Distribution

Send to Form 22.1
 Amount: 150000.00
 Save to Current Table Row

Name ^	Wrongful Death Forms	Minor's Claim Form 22.1	Amount
Mary S. Sample		X	\$150,000.00

Kin/Claimant Worksheet after first entry.

You are done with the first entry in the **Next of Kin Worksheet**., click the **Save to Table** button under the **Amount** field and your information will appear as the first record in the table. Your worksheet screen should look like the illustration at the bottom of the preceding page.

To add additional kin, click the **Add at End** button. You will see a new blank record at the end of the table. You can not complete the new entry using the top portion of the worksheet screen. Enter the remaining parent as shown in the **Sample** file, we will omit the entry-by-entry descriptions used for the first entry.

Final Notes About the Worksheet:

There should never be blank entry in the table, and *WMinor5* is designed to automatically remove accidental blank rows in the table.

There are more entries in the **SAMPLE** file but you should have the hang of it by now so that it is not necessary for us to go through each entry. If you wanted to continue following along in the **Sample** you could open the **Sample** and print the **Kin/Claimant Worksheet** by clicking **File|Print|Worksheets|Kin/Claimant**. Before we leave, however, there are several things to emphasize. These points apply to all three of the database worksheets, not just the **Kin/Claimant Worksheet**.

- You can only enter and modify information on the top part of the screen. The bottom part of the screen, as explained below, is for navigation, sorting, and viewing multiple rows at the same time.
- When you're done entering or modifying a record, send your information back to the table below by clicking the **Save To Table** button. You can also use the **<ENTER>** key for this purpose. Clicking this button takes the information on the top part of the screen and moves it to the currently selected row in the table on the bottom half of the screen.
- You can navigate, view multiple records, sort the table, and select a record for editing on the bottom part of the screen -- the part that looks like a spreadsheet.
- Almost every function in the worksheet can be implemented using hot keys. There is a right-click, popup menu that has all the commands along with the hot key combinations.
- Each of the columns in the worksheet can be resized by dragging and sliding the dividing bars between columns to the left to make a column smaller and to the right to make a column wider. This allows you to customize the worksheet for your particular computer monitor and screen resolution. *WMinor5* remembers your settings.
- The entire table can be sorted by most of the available columns by simply clicking your mouse on the column title. the sorted column has a caret mark (^) next to the column title.

Step 4. Enter all financial information in the Accounting Worksheet.

To enter financial information such as settlement offers, expenses or disbursements, go to the Display menu, open the Worksheets submenu and select Accounting. You can also display the Accounting Worksheet by pressing **CTRL** **E**. Like the Kin/Claimant Worksheet, when the Accounting Worksheet appears on your screen it is blank and ready to accept your first entry. We will enter the settlement offer first.

- When the worksheet appears, the focus should be in the left-most Description field. Here you can enter:

Imprudential Insurance Company

Note that you may use carriage returns in your description if you wish to insert hard line breaks. You can also type complete descriptive paragraphs, *WMinor5* will automatically reformat your text so that it fits in the allotted space on the chosen form. Click on the Ok button to close the mini editor.

- Press **→** to move to the next set of fields (Wrongful Death). This group is only used if the case is a wrongful death case. It contains a list of wrongful-death-related classifications from which you can pick. In the Sample we skipped this column.
- Press **→** to move to the next set of fields (Minor's Claims). This column is only used if the case is a minor's claim. It contains a list of minor-claim-related classifications from which you can pick. In the Sample we picked Settlement Offer for our first entry.
- Finally, press **→** to move to the Amount field. Enter \$750,000.00. Note that it is not necessary to enter the dollar sign (\$) or comma (.). In fact, *WMinor5* will not let you.

You are done with the first accounting entry. You do not have to save worksheet information because the worksheets save themselves automatically.

To add additional expenses, click the Add at End button. You will get a new blank record at the end of the table.

Enter the additional expenses as shown in the Sample file, we will omit the entry-by-entry descriptions used for the first expense. You can enter expenses in any order, but when they are displayed or printed out, like expenses will be grouped together, *ie.*, all physician's expenses listed together.

There are more entries in the SAMPLE file and it would serve no purpose to go

through each entry. The method for adding entries is the same as described above. If you wanted additional fodder for practice, load the **SAMPLE** file and print the **Accounting Worksheet** to use as a guide for making additional entries. Before we leave, however, there are several things to emphasize.


The illustration below shows what your screen should look like when you complete the first record.

Top portion of Accounting Worksheet after first entry

Step 5. Enter all attorney time and services related to the case in the **Time & Services Worksheet**.

The purpose of the **Time & Services Worksheet** is to give you a place to record your legal services rendered in connection with the handling of the estate or claim. You display the **Time & Services Worksheet** by pressing **CTRL B**. When the worksheet appears on your screen it is blank and ready to accept your first entry. It is much like the two worksheets we've just covered. In fact, it's more like the **Accounting Worksheet** in that it has a **Description** field in which you can enter descriptions of services regardless of length. Risking redundancy, here's an entry from the **Sample** file.

- When the worksheet appears, the focus should be in the left-most, high-lighted **Date** field. In the **Time & Services Worksheet** all entries are sorted chronologically. Like the **Date of Birth** field in the **Kin Worksheet**, you can pull down the calendar and pick your date. Clicking on the month at the top of the calendar lets you jump to other months, and it's the same with the year.
- Press **Tab** to move to the next field (**Time Spent**). Here you enter the time spent in fractions of hours. For example, one hour would be entered as 1; one and a half hours would be 1.5.
- Finally, press **Tab** to move to the **Rate** field. Here you enter the hourly rate to be applied to that service. We entered \$150.00 in the **Sample** file. Note that it is not necessary to enter the dollar sign (\$) or comma (.). In fact, **WMinor5** will not let you. **WMinor5** will also complete this field automatically based on your last entry. This way if the hourly rate doesn't change, you don't need to keep re-entering the hourly rate.

- Press  to move to the next field or column — **Description**. Here you can enter:

Initial office consultation with Mr. & Mrs. Sample; visit the scene of the automobile accident of 7/4/2003 at the intersection of West 223rd St and Liberty in North Ridgeville, Ohio.

Note that you may use carriage returns in your description if you wish to insert hard line breaks. You can also type complete descriptive paragraphs, *WMinor5* will automatically reformat your text so that it fits in the allotted space on the chosen form.

You are done with the first time and services entry. Click the **Save to Table** button to complete your first record or row in the table.


To add additional service records, click the **Add at End** button on the **Navigator** bar. You will get a new blank record or row. It will jump into proper chronological order after you enter the date and click on the **Save to Table** button.





Enter the additional items as shown in the **Sample** file, we will omit the entry-by-entry descriptions used for the first item. You can enter items in any order.

You may find it convenient to set the hourly rate so that it populates each new row automatically and you don't need to enter it manually. You can do that on the **Options** menu using the **Set Default Hourly Rate** item.

Step 6. Review the required forms and add any remaining information necessary for their completion.

In our minor claim example, we are using Forms 22.0 through 22.4. This step involves going to the **Display** menu, then to the **Minor's Claim** submenu and, one-by-one, selecting and completing the Form 22 set.

Beginning with Form 22.0 - Application to Settle a Minor's Claim, you'll notice when you display it that the caption and other information is already complete. The focus is on the first check box in the group. Place a check in this box and then press .

Skip the next four check boxes by pressing . Then check the sixth box, press , and enter "full and final" in the space before the word "settlement." Next press  and enter the case number. Press  again.

Place a check in the "The proffered settlement ... " check box. Then press .

Place checks in the boxes for the medical expenses and attorney fees provisions.

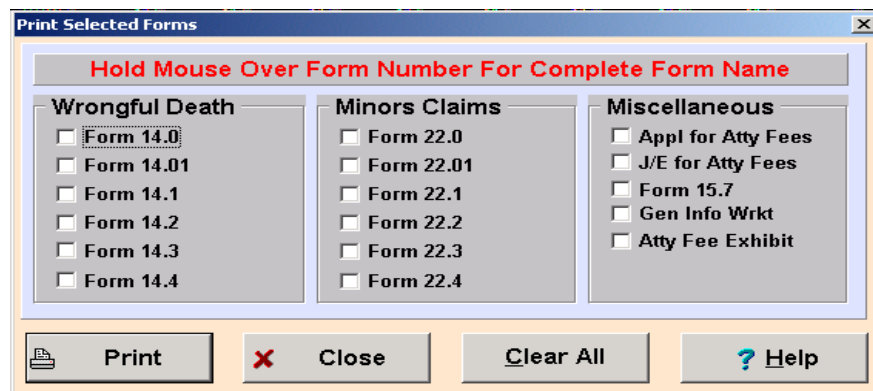
It shouldn't be necessary to take you through each entry. Simply tab from entry to entry on a form and completing those areas that need to be completed. Answers that are the basis of calculations or information transferred from other areas appears and blue. You cannot tab to these fields. If you need to change an answer in blue you must go to the worksheet where that information comes from. When you've tabbed from the last entry on a page, it jumps back to the top of the page and you know you've cycled through all the fields.

When you complete Form 22.0, you go to the Display menu and select Form 22.1. Complete Form 22.1 by tabbing through each entry and completing those that need to be completed. It may also be appropriate to complete the List of Medical Expenses, Attorney's Retainer Agreement and List of Suit Expenses. If you display these forms you'll see there's very little, if anything, for you enter. These forms complete themselves based on your worksheet entries. One thing to remember is to save your file periodically. We try to remember to press the **Save** button on the button bar (underneath the menu bar) after we finish every page.

Hint: You can check or uncheck a box from the keyboard by pressing the space bar. If your hands are already on the keyboard, it's easier to complete check boxes that reaching for the mouse and clicking.

Step 7. Print the various required forms using the File|Print|Selected Forms dialog.

When you're satisfied that the required forms are ready for filing, click the **Selected Forms** item on the **File** menu's **Print** submenu. When the dialog appears, it will permit you to select those forms that you'd like to print. In the event a form has continuation pages (*i.e.*, List of Medical Expenses and Proposed Payees), the entire set of that form will be printed. Further along on the **Print** menu there are items for printing individual forms or just the front or back side of a two-sided form. There is also the **Print This Form** button on the button bar. The hints will let you know what button it is - it has a graphic of a printer.



Selected Forms Dialog

Step 8. Optional. Send any form or forms to your word processor using the File|Send to Word Processor|Selected Forms dialog.

It's not necessary to send your forms to your word processor, but here are some reasons why you might want to.

- You have problems printing straight from *WMinor5*.
- You want or need to access exotic printer capabilities such as duplex printing, or non-sequential page printing.
- You want to email your forms
- You want to make pdf files of your forms
- You'd like to spell check the content of your forms
- You'd like to grammar check the content of your forms

The send function works best with Microsoft's *Word*. If you don't have *Word*, try *Wordpad*, but you'll need to set your page margins one time. Try top, left and right margins of 0.50" and a bottom margin of 0.25" for starters. Any other word processor must be capable of reading rtf files. Some don't and those that do often make file conversion mistakes making them problematic at best.

Don't Neglect Our Help Files

This paper manual is merely an outline of the basics of installation, getting started and a tutorial on basic information entry. You can get additional help via the program's **Help|Table of Contents** menu. This program has context-sensitive help. That means that you get help on a specific menu item without searching for that topic. Simply highlight the menu command and press **F1**. Many other objects on your screen have associated help topics, *i.e.*, window scaling. When in doubt, move focus to the component object and press **F1**.

The mouse won't work to highlight a menu command. You must use the keyboard. To give an example, if you wanted help with the **Save As** command you would press **ALT F** to pull down the **File** menu, and use the arrow keys to highlight the **Save As** command. With the command highlighted press the **F1** key.

If you're like us, you might be doubtful as to whether help files can be truly helpful. Regardless of any drawbacks, we found them to have significant benefits over their paper counterpart.

Help Is Always There

When we were at the office, the manual was at home. When we were on the computer at home, the manual was at the office. On unfortunate occasions, that alone can make you lose a day. It never happens with help files. They're always there. A copy for your home computer, and a separate one for the office. Ditto for your laptop! When you're desperate for information, you can always count on its accessibility.

Help Is Hyperlinked, Searchable & Better Indexed.

We took extra time to develop a logical system of indexing. You should find that a help file's searchability can be a time-saver when you're looking for a snatch of text. The point and click links between key words provide instant information without fumbling through page after page looking for something. This **non-linear** characteristic is part of what makes help files so uniquely useful.

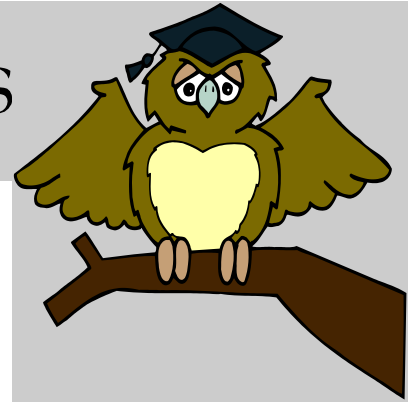
Help Is Up To Date

Because they are printed in large quantities, paper manuals fall out of synch with last-minute or late-minor programming changes. Help files, on the other hand, are easier to keep current with programming changes because their modification involves no additional processing steps to implement (*i.e.*, physical transportation, printing, binding, *etc.*).

Paper Fix

Don't forget that you can print any help topic by pressing the help window's **Print** button, or using the menu's **Print Topic** command.

Essential Help Topics



Checking out these help topics before starting *WMinor5* will reduce the slope of the learning curve. Although *WMinor5* relatively straightforward to use, you'll find that once you've mastered the database worksheets, you've learned not just this but all of our programs. This is because almost all of our programs use the worksheets to minimize data entry.

1. What are the worksheets used for?

There are three database worksheets (not to be confused with the General Information Worksheet). One of the three is the **Accounting Worksheet**. It is the central area where *WMinor5* keeps financial information. This short topic describes how to enter information into and use the worksheets. A similar worksheet is used for keeping track of spouses, children, parents, next of kin and beneficiaries. A third database worksheet is used to keep track of attorney time and services performed relative to the wrongful death or minor's claim.

2. What is the **DEFAULT.WM5** file?

This topic explains the purpose of the **DEFAULT.WM5** file and how to customize the blank, start-up set of probate forms so that common information appears automatically when you select **New** from the **File** menu.

3. Using The Keyboard

This is a good topic to print because it summarizes all the keyboard shortcut commands in the program.

4. Overriding Answers

You will use this command when you need to manipulate entries in text input dialogs that contain green colored texts.

5. Common Questions

If we get recurring questions about a particular facet of *WMinor5* operation, you will find the relevant help topic cited here.