# Quantum

*The complete integrated family forms and orders package*

Mr Justice Mostyn and Maggie Rae

# User Manual

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User Manual v.2017.1

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## Technical requirements for Quantum

**Computer environment:**
Any computer running Windows XP or later

**RAM:** 1GB

**Hard disk space:** at least 210MB for installation (i.e. excluding saving of files)

**Monitor:** Colour. Minimum screen resolution 1024x768. 1280x720 recommended.

**Printer:** Laser printers recommended

**Apple Mac users:** QUANTUM is a Windows program but it can be run on an Apple Mac if you use Windows emulation software. Examples of such software are Virtual Box and VMWare Fusion. Contact your local Apple Store if you need further help.

# Contents

# Helpdesk

We hope you find **QUANTUM** easy to use. However, if you have any questions at all, either installing or using the program, our expert helpdesk would be delighted to help you.

Call us between 9.00 am and 5.30 pm on

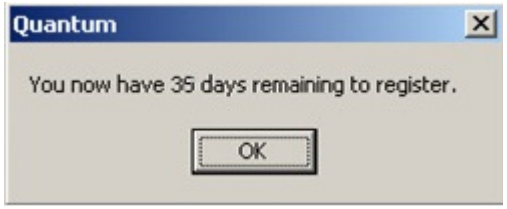
01652 652 222

# Installing and registering Quantum

## Step 1

From version 9.1 onwards, we have changed the way that **QUANTUM** becomes a registered software program.

When you've installed **QUANTUM** and open it you'll see this screen:

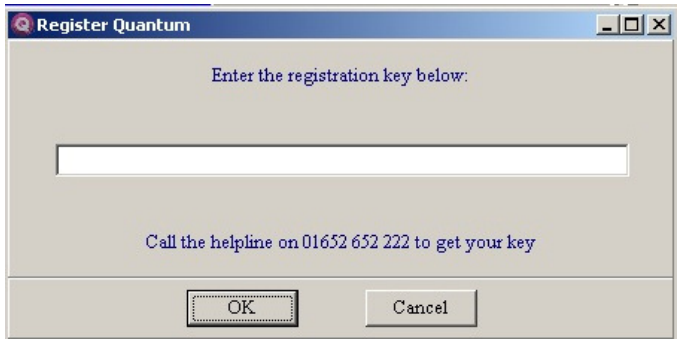



The days will count down until you need to register – though of course you can do at any time within the period.

## Step 2

### *Registering your licence*

Go to ***Help/Register Quantum*** and enter the registration key the helpdesk have emailed you and click OK:

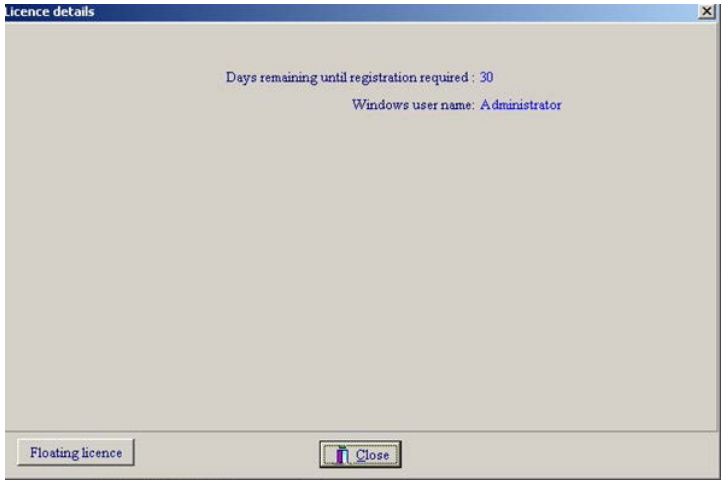



(Contact the helpdesk on 01652 652 222 or info@classlegal.com if you haven't received a key.)

### *Registering a floating licence*

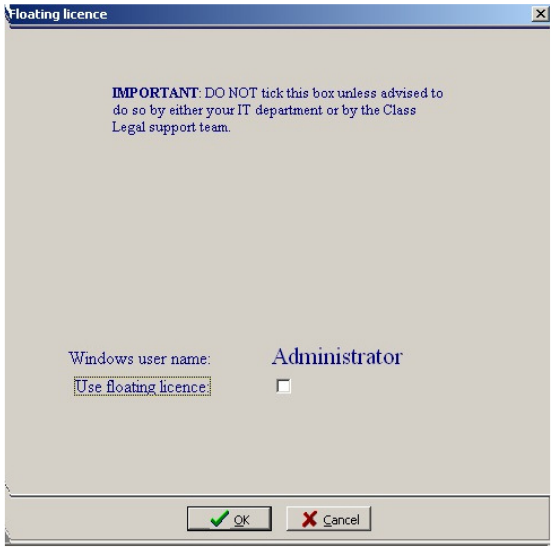
If you've installed **QUANTUM** within a terminal services environment you will already have been assigned a floating licence registration key.

Go to ***Help/Licence details*** and click the ***Floating licence*** button (note that our support team will require the Windows user name of each user so that the floating licence can be registered to each user name):



Each user will then need to tick the ***Use floating licence*** box on the screen that appears.

**IMPORTANT NOTE: Do not tick this box unless advised to do so by either your own IT department or by Class Legal.**




## *Extending or converting your free trial version*

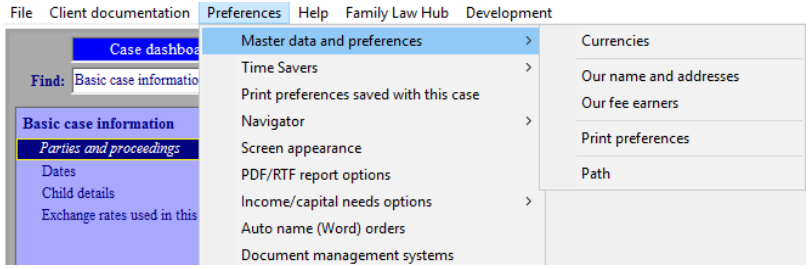
If you're trialling **QUANTUM** at the end of your 35 day free trial period you will see this screen:


Depending on whether you have already decided to purchase **QUANTUM** or would like longer to evaluate it, follow the appropriate instructions on the screen and then click the relevant button and enter the key you've been given.

# Before you start – setting your master data and preferences

***Preferences*** on the top menu allows you to customise **QUANTUM** to your own requirements.

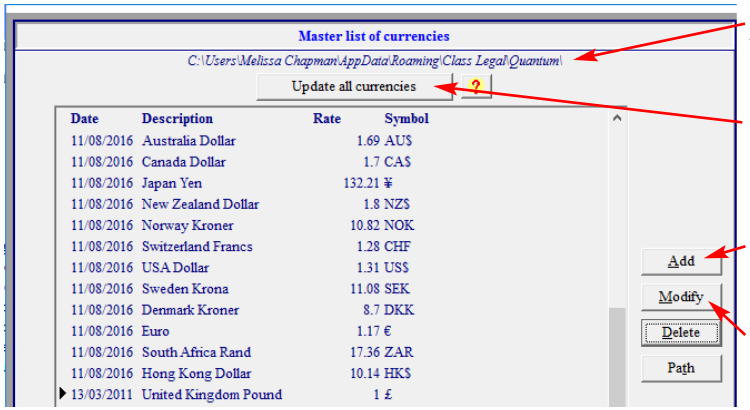
Under ***Master data and preferences*** there are 4 sections we'd advise you to look at before you start your first case.




## Currencies

This contains a master list list of currencies – depending on where your path is set to (see that section below), this list might be shared across your department, or only on your computer.

Either way, you access this list when you want to insert a currency in a particular case (see p13 for help how to do that).




*This is your current path for the currencies – see that section below*

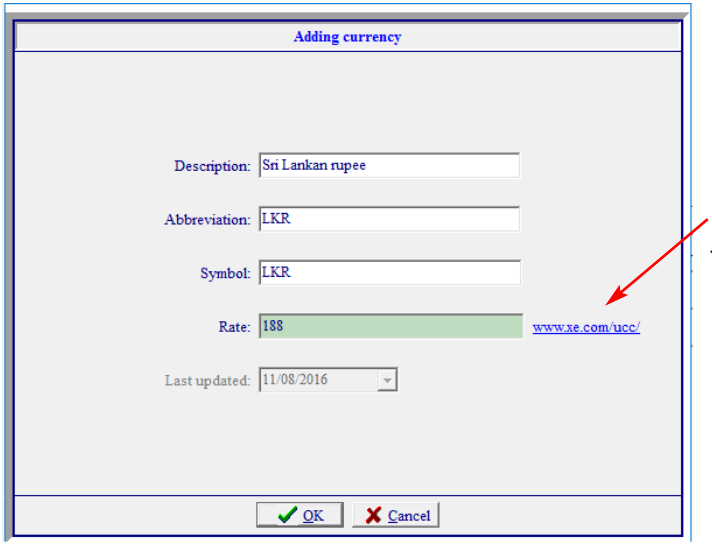
*Click here to update automatically currencies listed at the European Central Bank to today's rate and date*

*Add another currency to the master list – see below for more detail*

*Update manually the exchange rate of any currency not listed at the European Central Bank*

As the screen shot shows, click ***Update all currencies*** to insert the current exchange rate of all currencies listed at the European Central Bank.

You can add other currencies to the list yourself using the ***Add*** button as shown below:



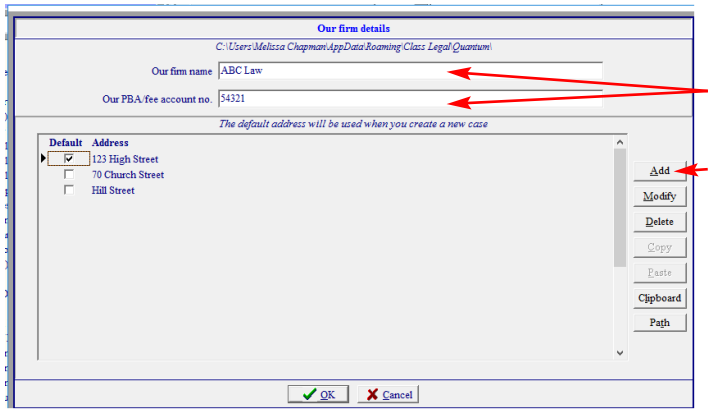

*Click here to find out the current exchange rate if needed*

Note that if that currency is not listed at the European Central Bank and you want to update the exchange rate at a later point

you'll need to do it manually, selecting it and clicking on the ***Modify*** button.

## Our details and Our fee earners

When you click on ***Our name and address*** you'll see this screen – complete it as below:




*Enter your firm's name and PBA/fee account no (if relevant) here*

*Add one or more addresses for your firm here, ticking which is the default (ie the one that should appear on your forms unless specified otherwise)*

(You might have added your firm's name and address and the usual fee-earner when you first installed the program – if so they'll be already listed here.)

Your firm's name, PBA/fee number and the default address will appear automatically in relevant sections of the forms or you will be given the option of inserting it, as relevant.

Note that although you set an address as default, you can select a different address for a particular case in ***Basic case information/Our details*** – see p11.

***Our fee earners*** allows you to list all relevant fee earners, so you can then pick them up to insert when completing forms (such as H1 and N260) which ask for fee earner names and hourly rates.

The fee earner selected as the default will appear in ***Basic case information/Our details***, and on the Statement of Truth for various forms if it is signed by a solicitor rather than the client. Again, you can select an alternative fee earner for a case in ***Basic case information/Our details***.

## Print preferences

Various options governing the way your printed forms look are gathered here.

Whatever you select here will be set as your default preferences for all new cases (though they can always be amended for a particular case by going to ***Preferences/Print preferences for this case***).

We've set the preferences to those our experience tells us most users want, but you should look through all the options and set your preferred options, as you may well want to change some of these standard settings. (Please call our helpline on 01652 652 222 if you want more detailed information on a particular option.)

Whether these preferences are unique to you or are shared depends on how the path is set – see below.

## Path

The default here is for the path to be set locally, so the master data and preferences discussed above are held on your machine only.

However, if the path here is set to a central shared location then every **QUANTUM** user in your firm can share the information and settings for the preferences mentioned above (the master list of currencies, the firm's address(es), fee earners and print preferences).

For this to happen, the file **MasterFirmDetails.db3** needs to be moved to this central location, and the path to it set here.

If you click on 'Default' then the path will revert to a local one and you will not be sharing the data.

(There's more information on this in our technical support document, ***Quantum – IT support***, which can be found on our website or requested from our helpline on 01652 652 222.)

# The navigator explained

In **QUANTUM**, the screen is divided into two parts.

On the left is a list of all the forms and sections within the program. Use this list (or 'navigator') to move from module to module.

You can type into the ***Find*** box at the top to locate any part of a form or a tool.

Use the drop down list under ***Display*** to choose which forms or section you want to see on the navigator.

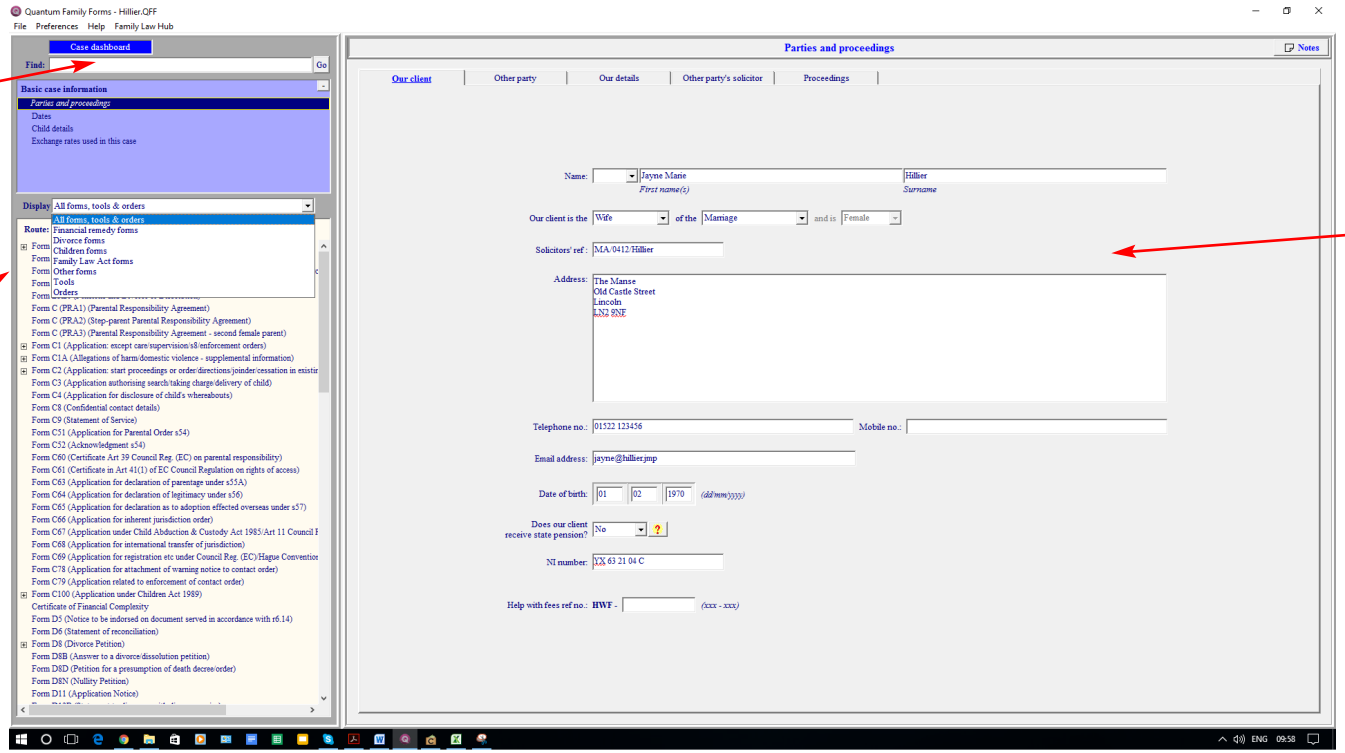
Whichever section is highlighted on the navigator will appear on the right of your screen.

## Further information

You can change the way the navigator displays modules by clicking on ***Preferences*** and then ***Navigator***. Select ***Organise*** to switch the Form E display between sections and pages. ***Expand all*** and ***Collapse all*** show and hide respectively all the subsections of the modules. The program will remember your chosen ***Navigator*** options and use them the next time you run **QUANTUM**.

*Type into the* Find *box at the top to locate any part of a form or a tool*

*Choose which forms or section you want to see*




*Whichever section is highlighted on the navigator will appear on the right of your screen*

# Basic case information

One case in **QUANTUM** can have numerous elements within it – i.e. forms such as D8, D8A, Form A and Form E, as well as asset schedules, chronologies and orders.

This section of the program is designed as an easy place to enter information of the case that's likely to be used in more than one place (e.g. your client's name or the case number). Once it's entered here you won't need to enter it again in the system, as **QUANTUM** will automatically insert it wherever needed.

The section is split into 4:

- Parties and proceedings
- Dates
- Child details
- Exchange rates used in this case

## Parties and proceedings

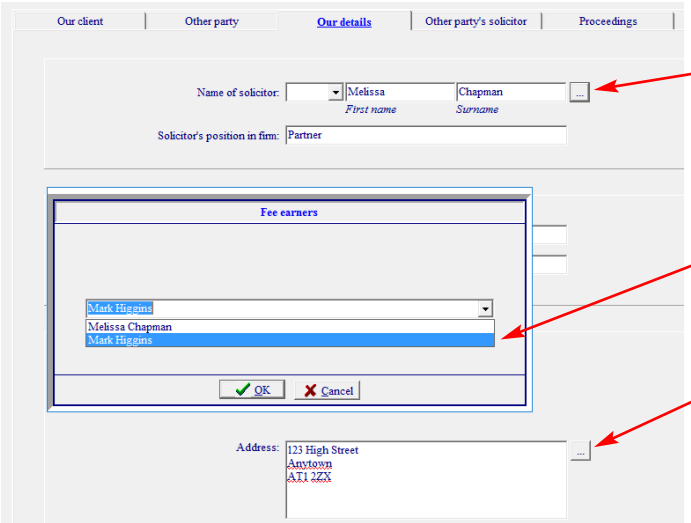
Here, as in many other parts of the program, you'll see the right hand screen is divided into tabs – click on the top of each tab and that one comes to the front.

### *Our client and Other party*

In ***Our client*** and ***Other party*** enter as much information as you have – leave anything blank that is not relevant, or which you want to come back to and enter later.

### *Our details*

In ***Our details*** the default fee earner (as selected in ***Preferences/Master data and preferences/Our fee earners*** – see that section above) will appear. If needed either type in a new name or select one already entered (in ***Preferences/Master data and preferences/Our fee earners***) as shown below:




*Click here to select a different fee earner, already entered in the master list …*

*… and then select the fee earner in the box that appears*

*In the same way, click here to select a different office address, already entered in the master list*

If the fee earner you want isn't entered in the list already you can either just type in the name or (recommended if you will use that fee earner's name again in the future) add them in ***Preferences/Master data and preferences/Our fee earners*** and then pick them from the list.

Your firm's name will be already entered (if not, see p8). If the firm has multiple offices and you want to choose a different address do that in the same way as adding a new fee earner, as shown in the image above.

(If the address hasn't yet been entered go to ***Preferences/Master data and preferences/Our name and addresses***, add it and then select it.)

### *Other party's solicitor*

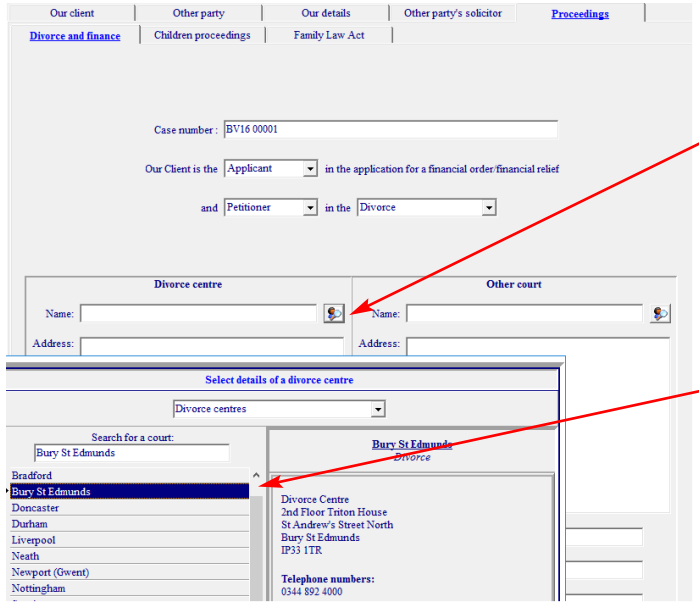
This should be self-explanatory. Again, enter as much information as you have – you don't need to complete it all.

### *Proceedings*

This tab is split into 3 parts, divorce and finance, children proceedings and Family Law Act. You might use any combination in a case.

Select the relevant type of proceedings, and then enter the case number and whether your client is the applicant or respondent (or petitioner or respondent in divorce etc proceedings).

Then enter the court details as shown below:




*Click here to open up the courts database…*

*…and then pick the court or divorce centre you want here*

Note that you can enter both a divorce centre and a court for the divorce and finance proceedings. If you do enter both, **QUANTUM** will decide which is the correct one to use for each form, and insert those details automatically (you can always change them).

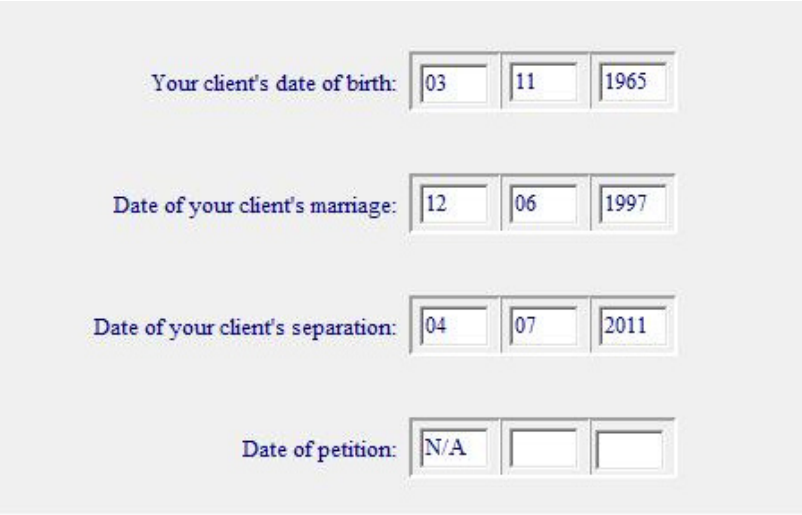
## Dates

Enter any applicable dates here, leaving others blank as necessary.

Note that although in general date boxes will only accept valid dates, there are a few alternatives you can type into the 'DD' box that will appear on the printed form:

- N/A
- ???
- ??
- ?

You can also leave the date blank, or add a month and year only or a year only.



## Child details

This is the first example of a list box in **QUANTUM**. List boxes allow you to enter as many instances of an item as are needed – i.e. there might be 1 child, or 6, or none.

To enter details of a child, click ***Add*** and complete the boxes that appear. When you have finished, click ***OK***. If you want to go back and change any information you have already entered, click ***Modify***, make the change and then click ***OK*** again.

(Note you are asked whether your client receives child benefit for the child – if you say 'Yes', **QUANTUM** will automatically insert this, at the full amount, in the ***Income from benefits*** section of Form E, or ***Income*** section of Forms E1/2 as appropriate. See the section on ***Preferences/Time savers*** for more information.)

If this case is using the standard Form A / Form E route (see the next section ***Route selector***) then this is all you need to do here.

If this case is using either the Form A1 / Form E1 or Form E2 route, or if you will want to carry out a child support calculation involving shared care (see the section on ***Child support calculations***) then click the blue ***Show questions needed…*** button and answer the further questions about children required by Forms A1, E1 and E2. This means you will have dealt with all children questions here, and won't need to remember to answer them separately in these forms.

As they appear so frequently, list boxes are also covered later on in this manual.

You can enter a general note about the children in the ***Any additional information*** box. This will appear on the printed form under the details of the individual children.

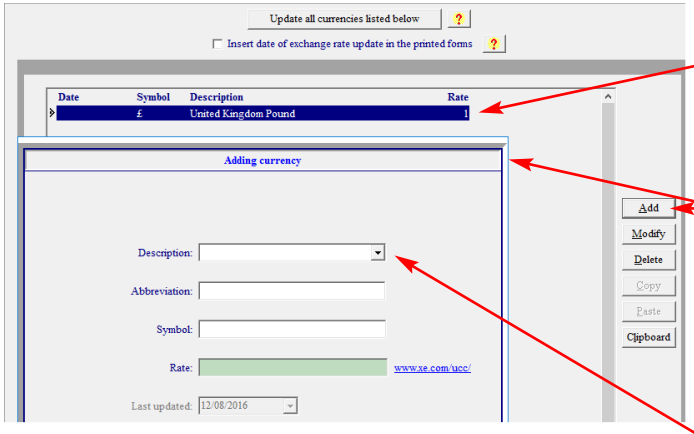
## Exchange rates used in this case

Any currencies used in a case will be listed here, together with their exchange rate.

A new case will start with only one listed – sterling. There are two ways off adding another currency to a case:

### *Adding a currency for the case here*

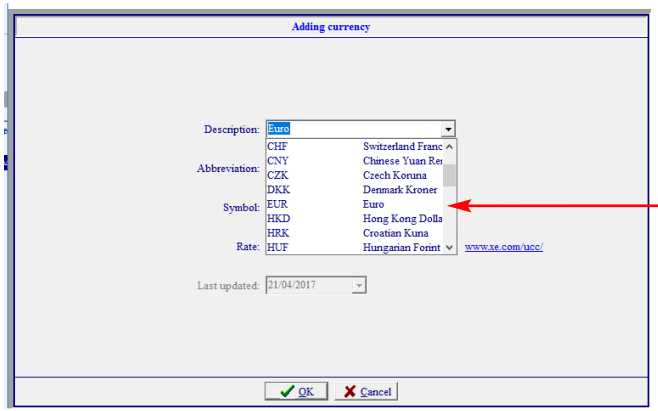
Let's say you want to add the Euro to your case – look at the images below to see how to do that:



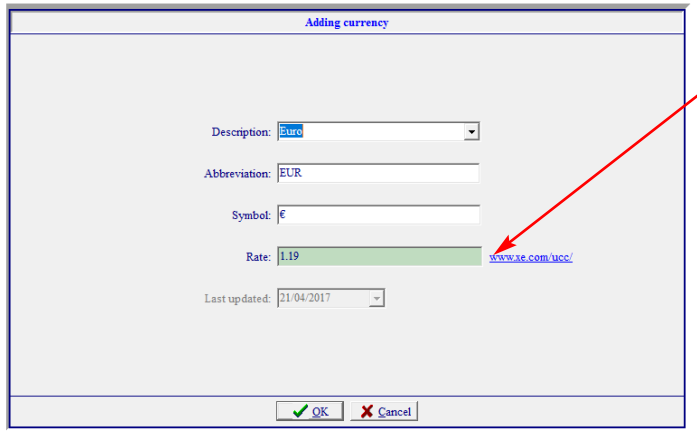

*In a new case only sterling is listed*

*Click here to add a new currency to the case and the* Adding currency *box appears*

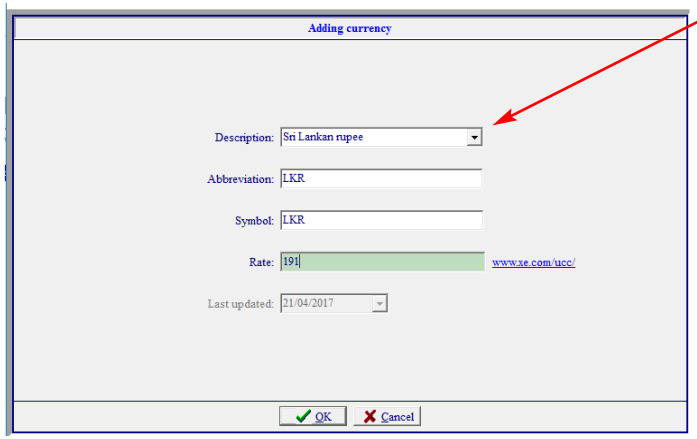
*Click on this dropdown to see if the currency is already listed in master currencies*




*If it is, then select it*

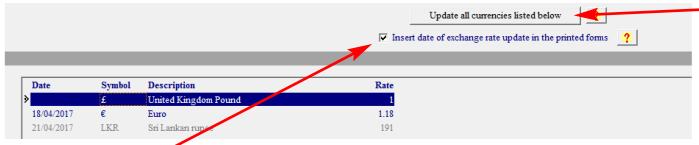



*Then either accept the exchange rate that has been copied from the master currencies list or change it to a different rate*




*If the currency isn't in the master list then add in the details here. If it's a currency you think you might use in other cases then you can add it to the master list of currencies instead (Preferences/ Master data and preferences/ Currencies)*

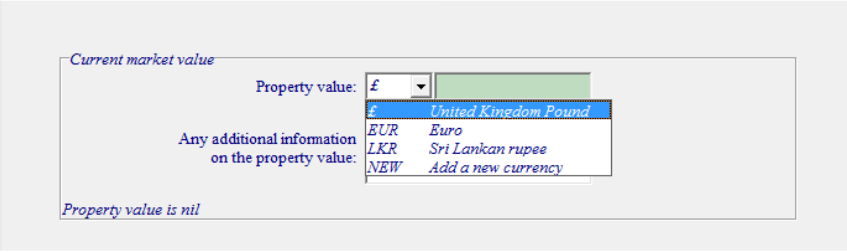
In this example we now have three currencies listed for your case:




*Update the exchange rate for these currencies by clicking here – note this WON'T update your master list*

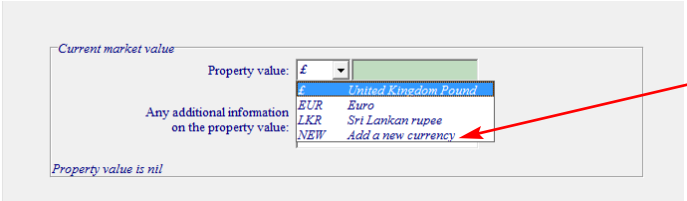
*You can set whether you want the date of these exchange rates to appear on your forms or not*

You'll be able to select any of them whilst adding an item to a form:



### *Adding a currency when you add the item valued in that currency*

You can also add a currency when you are in a form:



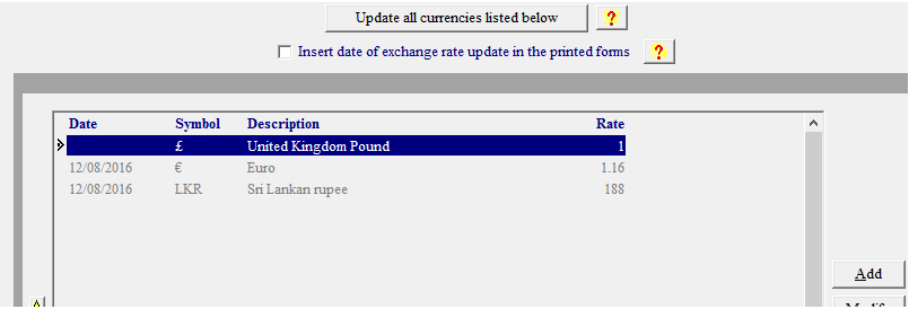

*Add a new currency as you are adding the item*

The ***Adding a currency box*** will appear, and as above you either select one from the master list or add one yourself.

### *Updating exchange rates used in a case*

After the initial exchange rate has been set you might want to update it.

Note that any updates made to the master list of currencies will NOT affect exchange rates already used in an existing case.




You can update the currencies for your case by clicking on ***Update all currencies listed for this case*** – any currencies listed at the European Central Bank will be updated automatically. You will need to update currencies not listed there manually, by selecting them and clicking ***Modify***.

# Route selector

There is a choice of 3 different routes you can take in **QUANTUM**:

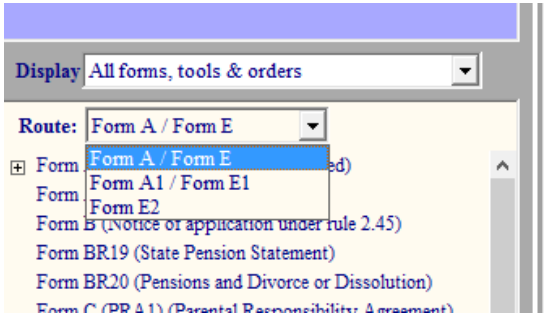
Form A and Form E (application for a financial order)

Form A1 and Form E1 (applications for financial remedy other than a financial order – notably Schedule 1)

Form E2 (application for variation of a financial remedy order)

Form A / Form E will be the most used route and is set as the default – that means that this route is selected each time you open a new case.

To change to another route, click the drop down arrow to the right of 'Route'.




You can change the route of a partially completed case. Data you have already entered will be copied across as relevant.

Each time you open an existing case, **QUANTUM** will remember the route you were on when you worked on the case last, and keep to that.

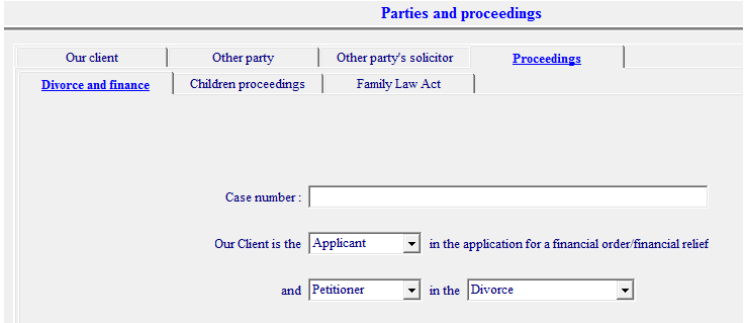
# Expandable forms

Whenever you might want a form to expand beyond the prescribed Court Service format (i.e. when you want to enter more text than a box allows), or we think there is something **QUANTUM** can do to help you (i.e. perform calculations) then that form is in an intelligent, expandable format.

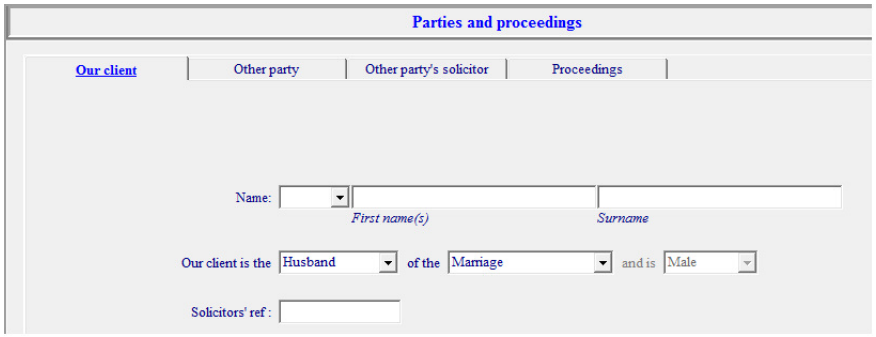
Within that format there are several types of data entry, which you will find throughout **QUANTUM**.

## Tabs

Whenever you see tabs in **QUANTUM**, click on the top of each one to bring those questions to the front.




Above, the ***Divorce and finance*** questions in the ***Proceedings*** part of ***Parties and proceedings*** are selected.




When you click on ***Our Client***, those questions are then displayed.

## Dropdown boxes

These dropdown boxes, indicated by an arrow at the right of the answer box, are used throughout **QUANTUM**.

Click on the dropdown arrow, and then select the appropriate answer.


## Tick boxes

Click on an option to select it and a tick will be inserted. Tick as many as are appropriate.

The applicant intends to: proceed with the application in the petition

for:
- [x] an order for maintenance pending suit or outcome of proceedings
- [ ] a secured provision order
- [ ] a lump sum order
- [ ] a property adjustment order
- [ ] a periodical payments order
- [x] a pension sharing order
- [ ] a pension attachment order
- [ ] a pension compensation sharing order
- [ ] a pension compensation attachment order

Address:

Note that the box 'Address' under 'a property adjustment order' is greyed out above, stopping you from entering anything there.

Wherever you see areas that are greyed out (disabled) in the program, it is because a selection you have made, or not made, renders that area unnecessary.

In this case, once 'a property adjustment order' is ticked, 'Address' is no longer greyed out, and you can type into the box.

The applicant intends to: proceed with the application in the petition

for:
- [ ] an order for maintenance pending suit or outcome of proceedings
- [ ] a secured provision order
- [ ] a lump sum order
- [x] a property adjustment order
- [ ] a periodical payments order
- [ ] a pension sharing order
- [ ] a pension attachment order
- [ ] a pension compensation sharing order
- [ ] a pension compensation attachment order

Address:

## Text boxes

Select a section such as ***Health*** from Form E twig of the the ***Navigator*** and it will appear on the right of the screen.

Wherever you see a white box, type directly into it. You can enter as much information as you want – that box on your printed report will expand as necessary.

Page Break | 1.11 Health | Notes

1.11 Details of the state of health of yourself and the children if you think this should be taken into account.

Yourself

*Wherever you see a white box, type directly into it. You can enter as much information as you want – the box will expand as necessary.*

### *Spell checking in text boxes*

If you see a red squiggly line under a word, it means that it may be spelt incorrectly. If you wish to correct it, right hand click with your mouse, and a list of suggestions will appear. Select the replacement you wish to use.

1.2 Date of birth: 01 02 1970 (dd/mm/yyyy)

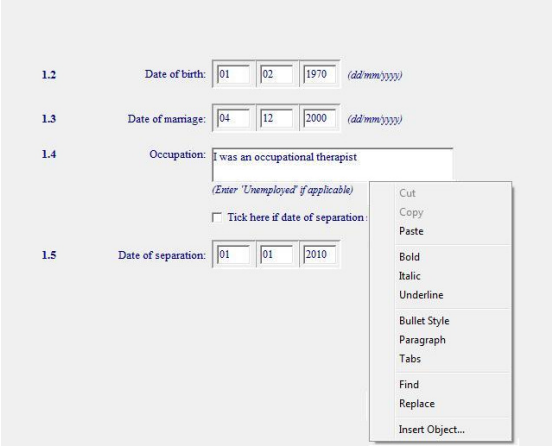
1.3 Date of marriage: 04 12 2000 (dd/mm/yyyy)

1.4 Occupation: I was an ocupational therapist

occupational
occupation
occupationally
occupations
occasional
Ignore
Ignore All
Add
Change All
Auto Correct
Spelling ...

## *Formatting text boxes*

Sometimes you may wish to emphasise certain words by using formatting such as bold or italics. Select the text you wish to format and right click with your mouse. The formatting menu will appear as follows:




(Note that if there is a possible spelling mistake in the text box the formatting menu will not appear as the spell checker takes priority.)

You cannot individually change the font type or size in a box, as **QUANTUM** makes sure that the overall font of the printed form is consistent. If you wish to change the default font then you must do it for all the forms and reports. To do this, go to ***Quantum Print Options*** on the top menu (there is a section on printing later in this manual).

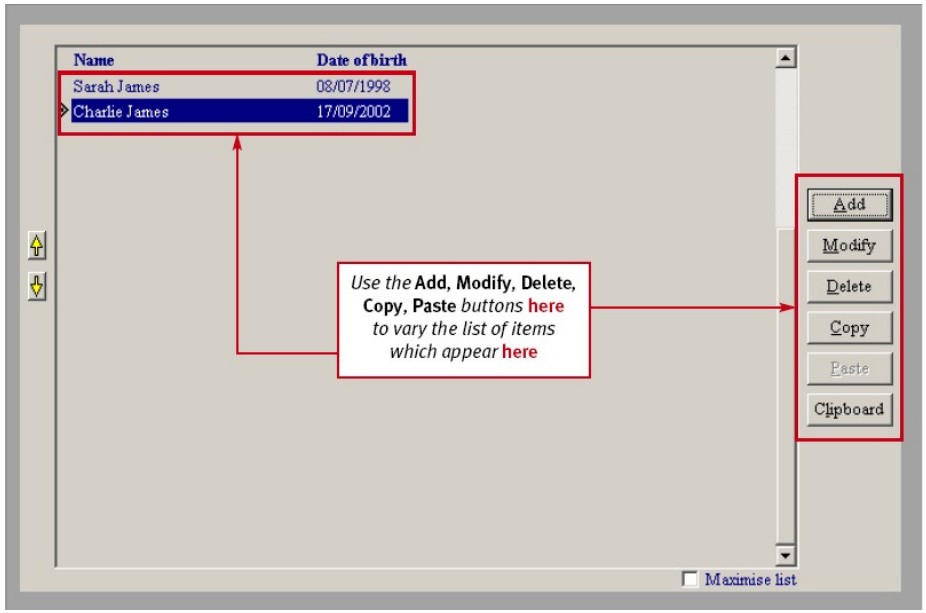
## List items

Where there is the possibility of multiple items (i.e. children, bank accounts, other properties) all with their own questions, you will see item boxes and a list of buttons to the right of them. The buttons allow you to add, modify and delete items.

Select ***Add*** to add a new item; ***Modify*** edits one already entered; ***Delete*** removes one. ***Copy*** copies an existing entry so you can ***Paste*** it back in – useful if you have an item similar to another, and you need to make a small change only.

When the screen comes up, type into the white text boxes as described above.

The ***Clipboard*** button allows you to transfer all the data displayed in the item box to another program such as Word or Excel.




*The yellow arrows allow you to re-order listed items: highlight the item and then move it*

## Calculation boxes

The values you enter in these green boxes are the ones **QUANTUM** detects and includes in all the running totals (and eventually in the ***Financial Summary***).

**QUANTUM** automatically keeps a running total of each figure you enter into a green box.

It picks up all the figures you have entered in the green boxes and forwards them to the relevant total.

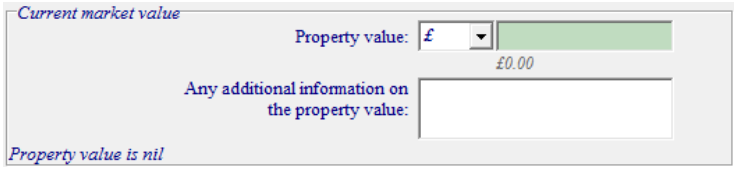
(For example, as you enter information on the matrimonial home, the mortgage amount will be deducted from the current value figure, and your client's share of the total asset value will be apportioned according to their share in the home. This figure will then be placed in Total A on page 4 of Form E and in the ***Financial Summaries*** on page 19.)

There are a couple of rules that you need to adhere to when entering data into these green calculation boxes:

Enter figures only (**do not** enter commas or any other character) – enter 100000, **not** 100,000

**Do not** enter currency signs – enter 100000, not £100000

Don't worry about formatting numbers with currency signs and commas, as these will be automatically inserted in the printed forms.

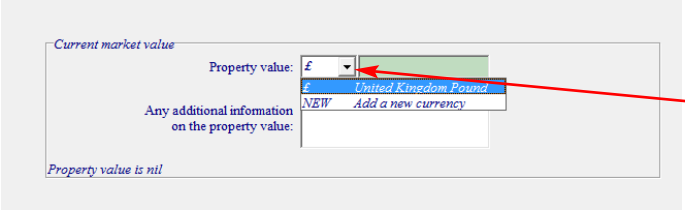



To check your entry, the figure you have entered will appear as it will be printed formatted below the blue box as above.

## *Currency*

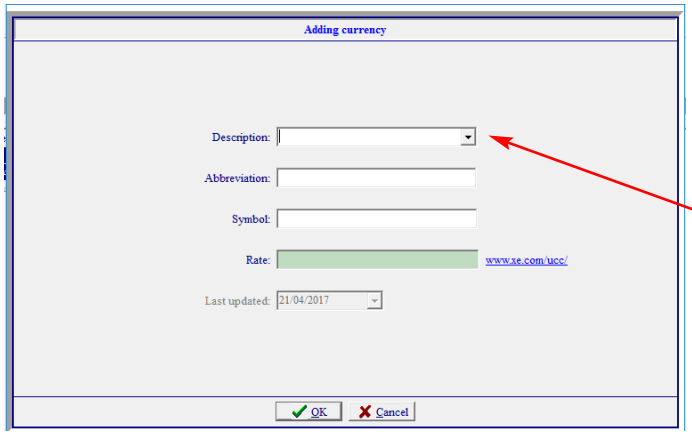
In all green calculation box sections you can specify the currency you want to enter.

Click on the arrow next to the £ sign:




*Click here to add a non-sterling value*

If any exchange rates have already been added for the case (see pxx for how to do this) you'll see them listed here and you can select them. Otherwise click to add a new currency:




*Click here to add a non-sterling value*

Once a currency has been added to your case you can update the exchange rate (and set whether the date of the rate appears on your printed forms or not) in ***Basic case information/Exchange rates used in this case*** (see p13).

Current market value

Property value: EUR 275000

£205,223.88

Any additional information on the property value:

Your share of the property value = £102,611.94

Total equity in property = £205,223.88
(A) Total value of your interest in the family home = £102,611.94

### *Shares*

There is a weblink in **section 2.4** which allows you to find the latest quoted price, and then paste this into the 'Current value' box. (You can change the weblink to any valuation site you choose.)

Click the calculator icon to work out the holding value.

(Note that the date you enter the share unit value will be printed on your report unless you turn this off – do this at ***Preferences/Time savers/Share prices***)

## Additional information boxes

Although you can enter an infinite amount of information into the forms, there are also specific ***Additional information*** entry boxes both under many of the calculation boxes and at the end of each section.

Use the specific additional information boxes to add a note relating to a particular value, as shown.

Current market value

Property value: £ 185000

£185,000.00

Any additional information on the property value: Awaiting further valuation

Your share of the property value = £92,500.00

This text will appear on your report directly below the value.

| | |
|---|---|
| **Current market value of the property** | £ 185,000.00<br>Awaiting a further valuation |

(On the ***Financial Summary*** page, where there isn't much room, post-it notes next to each subtotal show you where these Additional information boxes are.)

Use the ***Additional information*** boxes at the end of a section to enter more general information – for example a comment relating to all the children in the children section.

The heading 'Additional information' will only appear on the printed form if you have entered any information in that box.

## Income needs

### *Form E*

### Using the templates provided

The best and most efficient way to handle the income needs section in Form E is to use the templates provided.

It will help you enormously when you come to enter income needs if the Form E you have sent your client included the same

template. See the section ***Blank forms*** in ***Saving and printing*** later in this manual for more information on this.

Note: You do not have to start with a template; you can choose to enter each item individually by adding an entry each time. But this will take you a lot longer and is not recommended for income needs unless you have a short list!

## Quick data entry

Assuming you haven't changed the setting in ***Preferences*** so the template is not included (see the section ***Inserting income needs template*** in ***Saving and printing*** later in this manual), when you click on section 3.1.1, ***Your income needs***, the income needs template will be showing.

It will say at the top of the screen 'You are entering data by month in quick data entry mode'. As its name suggests, this is the quickest way to enter data, when all you need to enter is a figure.

In this mode, you only enter one set of figures – the future costs, which are those used in the calculations. By default the same figure will be inserted into the ***Current costs*** column, although you can change this by clicking on ***Make changes to ALL current income needs*** at the botton of the screen and selecting the 2nd option on the drop down menu. If you do this before you start all your current income needs boxes will be left blank, and you can click ***Modify*** to insert a figure in any particular one.)

You are entering data by month in quick data entry mode

Calculate total: Per year

| SECTION 1A Housing - Main Home | Future needs - quick entry (by month) | Total future nee |
|---|---|---|
| Mortgage instalments: interest only | 0 | |
| Mortgage instalments: repayment | 0 | |
| Rent | 0 | |
| Ground rent | 0 | |
| Service charge | 0 | |
| Endowment payments | 0 | |
| Residents' Association | 0 | |
| Council Tax | 0 | |
| Gas | 0 | |
| Electricity | 0 | |
| Coal | 0 | |
| Other fuel e.g. calor gas, oil | 0 | |
| Water rates | 0 | |
| General maintenance, repairs, decorations | 0 | |
| Boiler - servicing and maintenance | 0 | |
| Central heating system | 0 | |
| Aga | 0 | |
| Replacement and servicing of electrical | 0 | |
| Insurance | 0 | |

Add
Modify
Delete
Copy
Paste
Clipboard

Format
Make changes to ALL current income needs
Maximise list

Any additional information:

Make changes to ALL current income needs

Make the current income needs column = future income needs column
Make all current income need descriptions editable

*Click here to change the period for which the need applies*

*Click here to change from quick to standard entry mode – see the text for more info*

*This governs how the figures are displayed on the Form E itself – the default is as annual figures but you can change that here*

*Add new items that aren't on the template*

*Modify an item, including adding a different current income need*

*Tick here to expand the list so you can see more items at once*

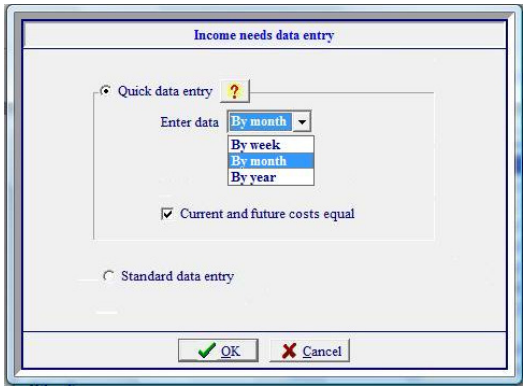
*By default, the current income needs will be entered as the same as the future ones. If you want to change this globally (as opposed to for just a few items) then select the second dropdown option here*

Then simply work down through the rows, entering the figures your client has provided by month into the ***Quick enter by month*** column. Make sure you press ***Return*** on your keyboard to move from one row to another, and don't click with your mouse.

Check the ***Maximise list*** box in the bottom right to see more rows on your screen.

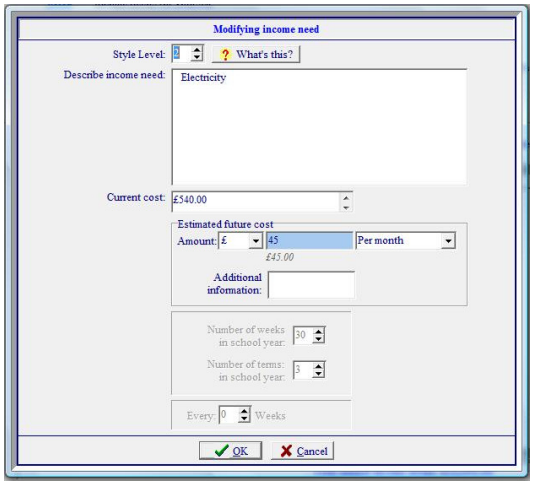
Ignore any rows your client has left blank.

If your client has provided some income needs as annual figures, click on the blue ***by month*** at the top and in the box that appears select ***by year***. Then work through the rows again adding any annual figures. (Repeat the process for any weekly figures.)




If you need to change an item's description, or enter a different figure for the current cost of an item (or a figure at all if you've decided at the start to leave the majority blank), highlight the row, then click ***Modify***. Make your changes and click ***OK***.

Use the ***Add*** button to add any items your client has listed that weren't on the template.

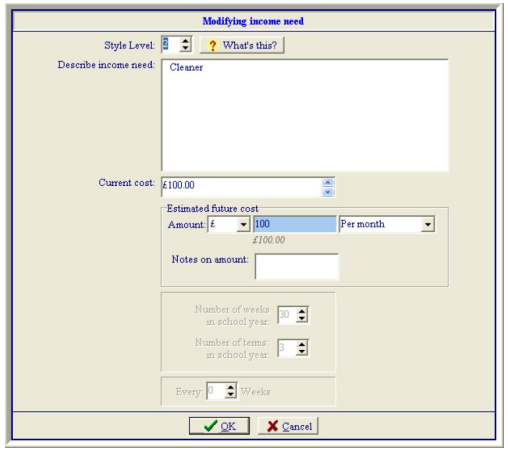



When you have finished entering all your client's income needs, click ***Delete*** and you'll be able to delete all the empty rows at once. Select to delete all items of zero value – i.e. the rows you have left blank – and they'll all be removed.


Select a period in the ***Calculate total*** drop down list box on the right hand side. This governs how the income needs will be calculated and displayed on your printed form.

## Standard data entry mode

To change to standard mode click on quick and select the standard entry mode radio button.




In this mode, you cannot enter directly into the screen.

Select ***Modify*** to enter information on an existing item, and ***Add*** to create a new entry (see above).

The ***Calculate total*** box below still governs how the total will be displayed and printed on the form – i.e. by week, month or year.


### *Style and heading levels – an example*

For example, the section heading 'Property costs and garden' is a 'Style level 1'. If **QUANTUM** finds items beneath it with a higher style level (i.e. level 2) then it will assume that 'Property costs and garden' is a heading. It will then assign the level 1 heading attributes (bold and underline). You can see what the style levels are by clicking on MODIFY. Essentially, *ClientNoChildren.nds* consists of only two style headings: 1 and 2.

Let's say you wish to expand the 'Telephone costs' and wish to create several sub-categories as follows:

Property costs and garden
  Telephone
    Land line
    Mobile

1. Click on 'Telephone – land line' to select it.
2. Click on MODIFY
3. Change the text to 'Telephone' and click on OK
4. Click on ADD
   (a) Change the style heading to '3'
   (b) Enter the description 'Land line'
   (c) Enter 50 in the blue amount box
   (d) Change the period to 'Per quarter'
   (e) Click on OK
5. Note how 'Telephone' becomes underlined and 'Landline' falls beneath it.
6. Click on ADD
   (a) Ensure the style heading is '3'.
   (b) Enter the description 'Mobile'
   (c) Enter 30 in the blue amount box.
   (d) Change the period to 'Per month'
   (e) Click on OK

### *Forms E1 and E2*

Unlike Form E, in both Forms E1 and E2 there is a given list of expenses on the prescribed Court form.

The default in **QUANTUM** is for you to enter data in Forms E1 and E2 using these lists.

Select the period (weekly or monthly) for which you want to enter data – this is also how the expenses will appear on the report.

Select an item and then click ***Modify*** to add an amount.

You can add new expenses here in two prescribed categories – 'Insurance – other' and 'Others'. When you click ***Add***, select the category into which you want the expense placed, and then enter a description and amount.

If you don't want to follow the prescribed form layout, and would rather use the Form E income needs template, go to ***Preferences/Income/capital needs/Forms E1 and E2*** and change the selection there. See the sections above this on how to work with the template.

### Using your own templates

If you want to use your firm's own income needs template, rather than the one in **QUANTUM**, we can incorporate it into the program for you, where it will work exactly as described here.

Contact the helpline on 01652 652 222.

## Other features within Form E

### Voluntary disclosure version

Tick the box on the cover sheet if you want a Form E for voluntary disclosure. The cover sheet (and various references to the Court process later in the form) will then be amended accordingly.


You can uncheck this box at any time – you won't lose any data.

### Child support maintenance calculators

Section 1.13 of Form E (Child support calculation) asks for an estimate of the paying parent's liability if maintenance has not yet been set.

You can calculate child maintenance under either the 2000 or 2008 régime, and both deal with shared care. (There a link to help you if you are unsure as to which régime to calculate under.)

Answer the questions that appear and then click ***Insert child support***. The calculation is performed and standard text (which you can amend) is then dropped into the report for you.


The calculators can also be found in the child support sections of D8A and also under ***Tools***.

Note if your calculation involves shared care you need to specify the number of night the child(ren) stay with the paying parent by

clicking the blue button in ***Basic case information/Child*** details.

### *Importing pension data from Form P (and PPF)*

If you've already created a Form P (or Form PPF) then you can import the relevant details of this pension into Form E, to save you re-entering it.

Select from the drop-down list where you want to pull the information in from and then click ***Import***. You'll see that a pension record is automatically created in Form E, and the relevant data copied across.

### *Income from benefits*

## Child benefit

When you add a child in ***Data common to several forms/Child details*** you will be asked 'Does your client receive child benefit for this child?'

If you answer yes, the appropriate amount of child benefit will be added automatically to **section 2.18, State Benefits** in Form E (or to the appropriate income section in Form E1 or E2).

*Note: the full amount of child benefit is always inserted; if your client then pays some of it back in tax you must remember to enter that deduction.*

For information on how to update and maintain these rates (and to switch off the auto-insert) see the section on ***Preferences/ Time savers/Child benefit***.

## State pension

When you enter your client's details, you will be asked if they receive a state pension.

If you answer yes, the appropriate amount will be added automatically to **section 2.18, State Benefits** in Form E (or to the appropriate sections in Form E1 or E2).

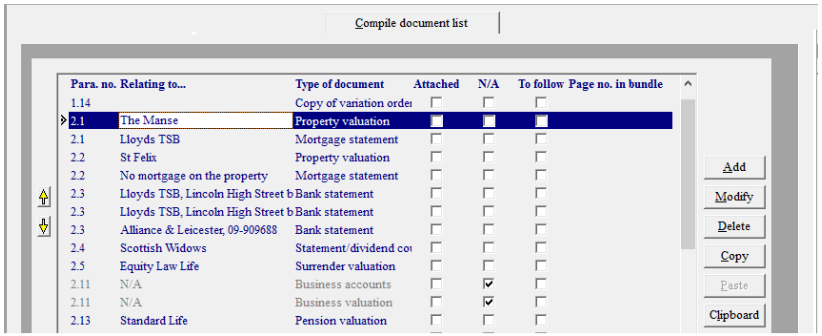
For information on how to update and maintain these rates (and to switch off the auto-insert) see the section on ***Preferences/ Time savers/State pension***.

### *Schedule of documents*

Complete this page when you are ready to file your Form E (or Form E1 or E2). Click on 'Compile document list' and the prescribed list of entries will be pulled in, with the sections where you have completed in Form E in blue. Where you have left sections blank, the entries are in grey and the 'N/A' column ticked already (you can change this). If you want to fill in the column 'Page no. in bundle' click on ***Modify*** and do it there.

Select whether the relevant document will be attached to the form or will follow.

You can add, delete and modify entries using the buttons on the right.




### *Back page*

Information you have entered in ***Basic case information*** and your firm's details will be automatically transferred here, to create a back page for your Form E (or Form E1 or E2).


Case no. 06 D 100306

In the Lincoln County Court

In the marriage between

Jayne Marie Hillier
who is the Applicant

and

David Iain Hillier
who is the Respondent

Financial Statement on behalf of
Jayne Marie Hillier
who is the wife
Petitioner in the divorce
Applicant in this matter

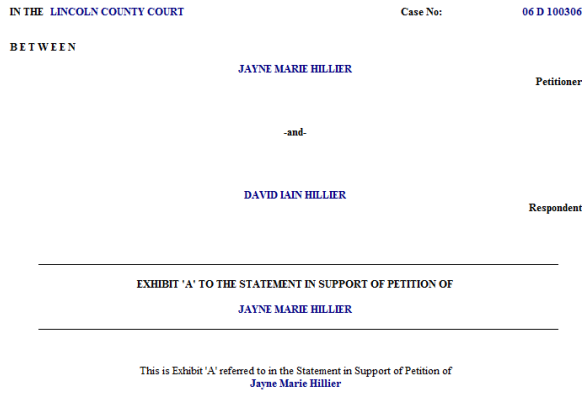
This statement is filed by
ABC Law
ABC House
50 High Street Lincoln

who are solicitors for the wife

## Other features within the expandable forms

### *Form D8o*

If you want to print an 'Exhibit' sheet to attach to your Form D80 (Statement in support of petition) go to the final tab in whichever version of D80 you are using and tick the box(es) there. It/they will then print out as the last page of the form.


IN THE LINCOLN COUNTY COURT Case No: 06 D 100306

BETWEEN

JAYNE MARIE HILLIER Petitioner

-and-

DAVID IAIN HILLIER Respondent

EXHIBIT 'A' TO THE STATEMENT IN SUPPORT OF PETITION OF
JAYNE MARIE HILLIER

This is Exhibit 'A' referred to in the Statement in Support of Petition of
Jayne Marie Hillier

### *Form H (Estimate of Costs)*

You can create and save more than one Form H here.

Click ***Add*** to create each one.

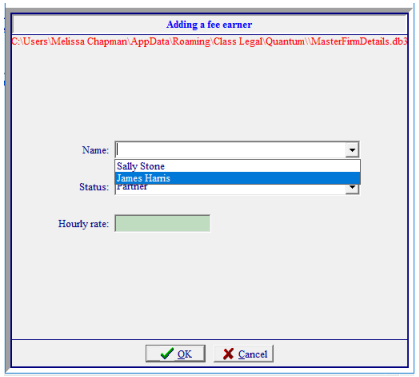
Note that although you come to the 'Summary' section last as you enter data (so that the totals can be calculated before you complete it), it will print out in the 'correct' place at the top of the form!

If you have to complete more than one Form H, click on ***Add*** again and follow the same procedure.

### *Form H1 (Statement of Costs)*

Click ***Add*** to create a form (you can create as many as you need for each case).

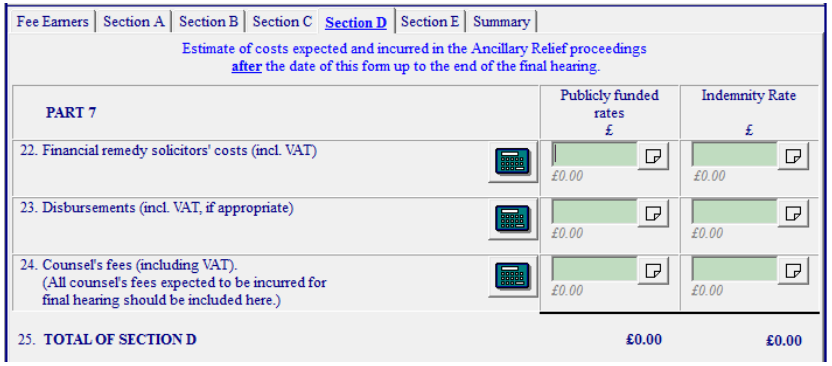
You can add fee-earners directly here, by just filling in the relevant boxes. Or, if you have names already entered into the fee-earner database (see p8) you can select them from a drop-down list:




*Click here to see a list of fee-earners you have entered in the database. Choose the name you want.*

The fee-earner's status and rate will then be automatically inserted. (If you have both an indemnity and a publicly funded rate entered, you will be asked which you wish to appear at the top of the form.)

In Section D (where you are asked to estimate future costs) we have provided you with appropriate calculators. For example, for solicitors' costs, you can select from fee-earners already entered, enter their future expected hours, and the total cost will be calculated.




Similar breakdowns are supplied for the other two questions. In all cases, VAT is added (if appropriate) as a default, but this can be de-selected.

Note that although you come to the 'Summary' section of the form last as you enter data (so that the totals can be calculated before you complete it), it **will** print out in the 'correct' place at the top of the form!

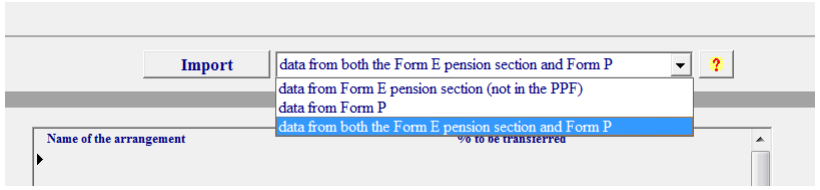
If you have to complete more than one Form H1, click on ***Add*** again and follow the same procedure.

## Pension Forms

You can create and save more than one of each type of pension form here – i.e. one for each pension. Select the form you wish to fill in, and click ***Add*** to create each one. (Though you can only create one BR19 and BR20, as there is only one state pension.)

Throughout the pension forms you'll see that you can import relevant details of pensions already entered elsewhere, to save you having to type it in again. For example, if you're creating a Form P1, you can pull in a pension entered in Form P or Form E.

Select from the drop-down list where you want to pull the information in from and then click ***Import***. You'll see that a form is automatically created for that pension, and the relevant data copied across.

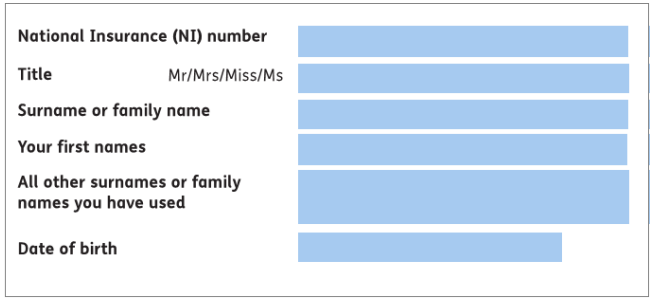


# Non-expandable forms

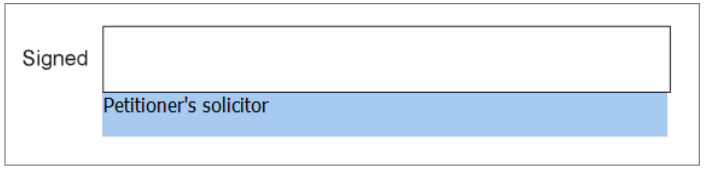
Some forms have been developed as non-expandable PDF-style forms as they don't need **QUANTUM**'s ability to expand and intelligent handling of calculations.

## Blue text boxes

You enter data directly into the **blue text boxes** in the form. The boxes do not expand and the data will not be checked or validated (i.e. you can enter anything you like in a date box).

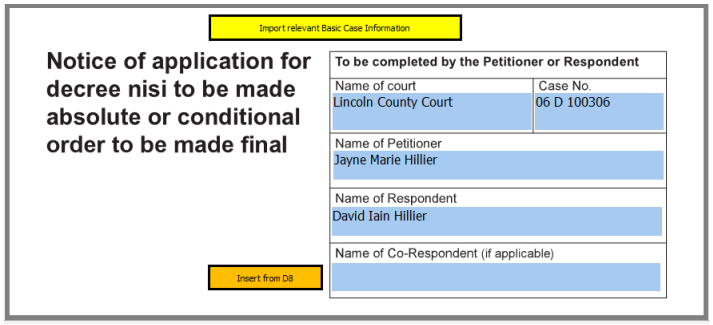



In some cases we have inserted what we consider the most likely text into a blue text box – for example that D36 is signed by the 'Petitioner's solicitor' rather than the 'Petitioner'. You can edit this text as you need to.

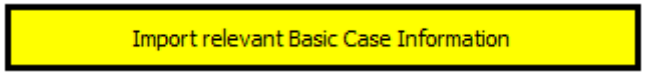



## Auto-fill of relevant data

**QUANTUM** will auto-fill any relevant data from ***Basic case information*** the first time you enter the form.




If you change any of this data it will not be changed in ***Basic case information***. If you ever wish to re-insert this data click on the **yellow button** ***Import relevant Basic case information***.




Note that **QUANTUM** will pick up from ***Basic case information*** whether your client is the Applicant/Respondent or Petitioner/Respondent and fill the form in accordingly. (You can change this within the form if you need to.)

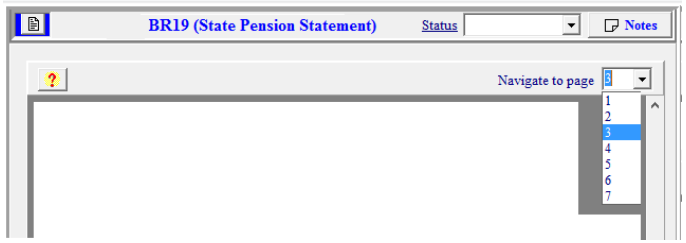
The exceptions to this are the children forms, where **QUANTUM** will ask you if your client is the Applicant or Respondent.

## Orange buttons

**Orange buttons** insert relevant data already entered in places other than in ***Basic case information*** – for example your firm's details. This data is not dropped in automatically, but only when you choose to do so by clicking on the orange button.


## Moving around the form

Move from page to page using the scroll bar or changing the page in the drop down list box at the top of the screen.




# Tools

## Child Support Calculation

This accesses the same calculators found in Form E – see p25.

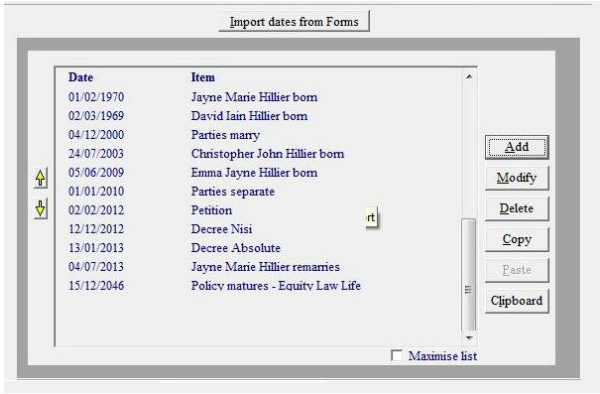
## Chronology

**QUANTUM** assumes that the Chronology will be created once your client's Form E (or Form E1 or E2) has been completed.

Click on the button ***Import dates from forms*** and a list of items will be dropped in.

Use the arrows to move items around while you are compiling your list, but don't worry about sorting it, as this will be done automatically when you print the chronology.

Add additional items by clicking on ***Add***; use ***Modify*** to edit existing entries.




*Yellow buttons move your entries up or down*

### *Sort date and display date*

An item's **sort date** determines where in the Chronology it is placed. This date will be printed in the Chronology unless you change it in the **display date** field.

Sometimes you may not want to put in an exact date but, for example, a month or range of dates. Enter this in the **display date** field. However, to work out where to place the item in the Chronology, **QUANTUM** needs an exact date – and so you must also enter a **Sort Date** for the item. For example, and as shown in the picture, for the entry showing when the couple separated:

| Display date | Possible sort date to enter |
|---|---|
| October 2011 | 01/10/2011 |

### *Export to Word or Excel*

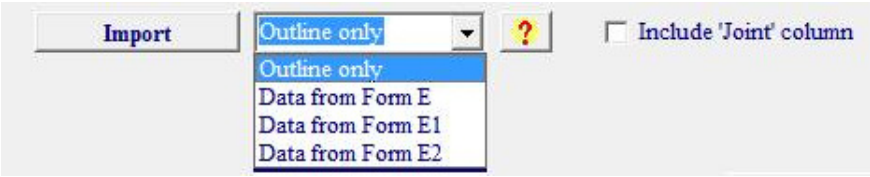
Either complete the Chronology using **QUANTUM** or use the

***Clipboard*** facility to export the items to Word or Excel. Then paste the data into your document or workbook there.

## Schedule of Assets

NOTE: **QUANTUM** assumes that the Schedule of Assets will be created once your client's Form E (or Form E1 or E2) has been completed. This means that any information you amend in the Schedule of Assets will not be similarly amended in the form – you will have to go back and alter the information in the form yourself.

Choose which form you want to pull data in from and click on the button ***Import*** to insert information. 'Outline' will pull in only the item descriptions, but no figures.




You will now see all the assets entered in your client's Form E listed in the Schedule of Assets. Assets you have specified as jointly owned will have 50% of the value in the wife and husband's column. Note that you can decide whether to include a 'Joint' column or not.

The program also puts in some text to be printed at the top of your report – date of marriage and separation and the ages of children. Delete, amend or add to this as you wish.

**(Note that you can now export this data (with formulae) so you can work on it in Excel – see page 32.)**

| Description | Wife | Husband | Total |
|---|---|---|---|
| **Matrimonial Home** | | | |
| Lindley View, Stainburn, Yorkshire, YK1 2AB | £112,500.00 | £112,500.00 | £225,000.00 |
| *Cost of sale at 3% of £225,000.00* | -£3,375.00 | -£3,375.00 | -£6,750.00 |
| Mortgage with Leeds Permanent | -£50,000.00 | -£50,000.00 | -£100,000.00 |
| **Other properties** | | | |
| Apartment 405, 19028 Loule Road East, Almancil, | £48,971.93 | £48,971.93 | £97,943.85 |
| **Other assets** | | | |
| HSBC, Otley | £1,215.00 | | £1,215.00 |
| Bradford and Bingley | £5,000.50 | £5,000.50 | £10,001.00 |
| Standard Life policy | | £36,000.00 | £36,000.00 |
| **Liabilities** | | | |
| Access card | -£1,350.00 | | -£1,350.00 |
| Present solicitors - fees owed | -£850.00 | | -£850.00 |
| Former solicitors - fees owed | -£1,684.00 | | -£1,684.00 |
| **Grand Total** | | | |

*For all properties (matrimonial and others)* **QUANTUM** *assumes that the balance of the asset is held by the other side*

### *Properties*

For all properties (matrimonial and others) **QUANTUM** assumes that the balance of the asset is held by the other side. For example, if your client wife has a 50% interest in the matrimonial home, the remaining 50% will be assigned to the husband. This assigning of the remaining percentage to the other side occurs only on properties.

### *Adding and modifying entries*

Remember that the only data entered here when you import it is your client's – apart from the residual interest in the properties.

So you will want to add and modify some entries when you have seen the other side's Form E.

### Modifying entries

To modify (edit) an entry, highlight it and click ***Modify***.

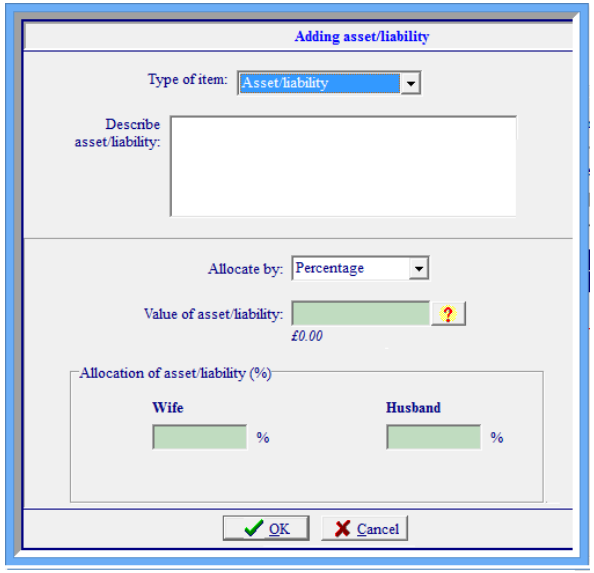
Change the percentage share and/or value of the asset.

## Adding entries

To add a new entry, decide where in the list you want to place the entry, highlight the entry above and click ***Add***.

Describe it, enter the value and then allocate an amount or percentage to either or both sides.

To add a new heading for a group of assets, click Add then change the type of item to heading and enter a description. Click ***OK***.




## *Grand total*

**QUANTUM** automatically places the Grand Total for the Schedule of Assets before income and pensions. You can move it up or down the report by using the yellow arrow keys on the left.

You can also add further Grand Totals by clicking on that button.

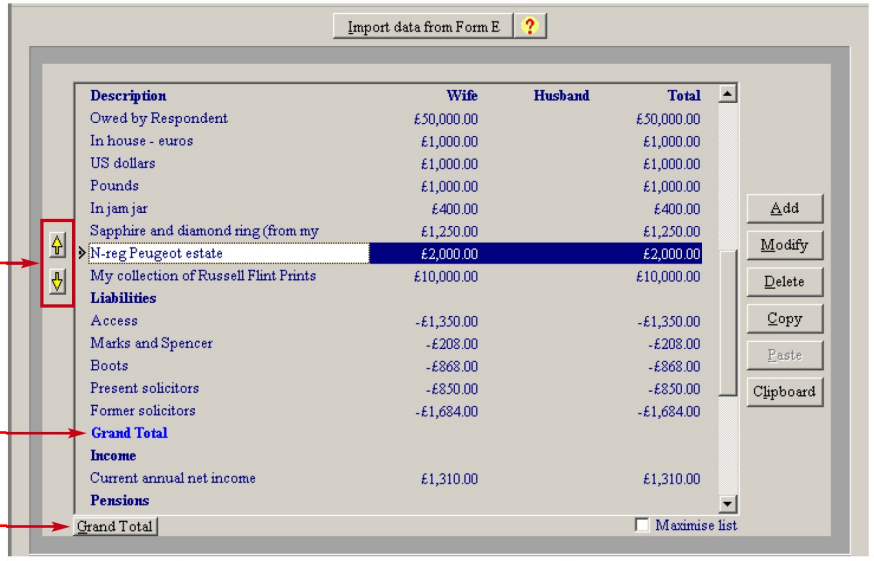
Don't worry when the Grand Total doesn't appear on screen – it will on the printed report!

(When the Schedule of Assets is printed, all the items above a Grand Total line will be added together and a value and percentage allocated to husband and wife.)

*You can also add further* **Grand Totals** *by clicking on this button*

**Quantum** *automatically adds a* **Grand Total** *before income and pensions*

*Highlight the* **Grand Total** *line and use these arrow keys to move it up and down*




## *Clipboard – working on the Schedule of Assets in Excel*

Once the basic data is pulled into the Schedule of Assets tool and formatted, some users might prefer to then export it to Excel to work further on the data there.

Use the Clipboard facility to copy the items onto your clipboard, and then select Paste when in Excel (or any other program) to drop the data into your workbook/document.

When you copy data to the clipboard you will be asked if you

want to include the underlying formulae or not. It may be helpful to have them if you will be working on the schedule in Excel.

## Financial Remedy Timetabler

In the Family Court sitting at: Other court: Lincoln (Change court details in Basic Case Information)

Appointment: First Appointment

Date of First Appointment: 07/09/2017

| | | | |
|---|---|---|---|
| File & exchange | Form E: | by | Thursday 03/08/2017 |
| File & serve | Statement of Issues:<br>Chronology:<br>Questionnaire:<br>Form G:<br>Confirmation of service on mortgagees, trustees and other relevant 3rd parties: | all by | Thursday 24/08/2017 |
| File & exchange *(if possible)* | Case summary:<br>Agreed Schedule of Assets:<br>Proposed Directions: | by | Thursday 24/08/2017 |
| File & serve | Woolf costs schedule: *(if appropriate)* | all by | Wednesday 06/09/2017 |
| Prepare | Form H: | on | Thursday 07/09/2017 |
| | **First Appointment:** | | Thursday 07/09/2017 |

Select the type of appointment and its date (you will be warned if you have entered a Saturday or Sunday).

The date and nature of each pre-appointment compulsory stage is shown.

You can then print this out and use it for your client file (see the image which follows).

**In the Family Court sitting at**
Lincoln
**Case No.**
06 D 100306
**Between**
*Applicant* Jayne Marie Hillier
**and**
*Respondent* David Iain Hillier

**Financial Relief Timetable**
First Appointment
07/09/2017

| | | | |
|---|---|---|---|
| File & exchange | Form E: | by | **03/08/2017** |
| File & serve | Statement of Issues:<br>Chronology:<br>Questionnaire:<br>Form G:<br>Confirmation of service on mortgages, trustees and other relevant 3rd parties: | all by | **24/08/2017** |
| File & exchange *(if possible)* | Case summary:<br>Agreed Schedule of Assets:<br>Proposed Directions: | by | **24/08/2017** |
| File & serve | Woolf costs schedule: *(if appropriate);* | by | **06/09/2017** |
| Prepare | Form H: | on | **07/09/2017** |
| | **First Appointment:** | | **07/09/2017** |

## Fee Remissions Calculator

Work out if your client is eligible for a fee remission and print out a report.

## Family Law Hub

Access Family Law Hub here – free material for everyone, protected material if you're signed into your existing account.

## Court Service Guidance Notes

Links to HMCTS Guidance Notes are here. You might find it useful to save them to pdfs to email to your clients.

## Quantum Webinars

Links to various webinars on **QUANTUM** – either introductory ones for those new to the program or more specialised ones for advanced users.

# Orders

At the bottom of the Navigator you will see a section called ***Orders***. This is where you can create orders, based on the standard order templates released by the President of the Family Division, personalized to your case.

## Create an order

Create an order following the steps below:

Type of order: Financial Orders (General)

Order: Financial Remedy Directions Orders (longer version)

Click here to check whether new orders are available

Family Court sitting at: Divorce centre: Bury St Edmunds (Change court details in Basic Case Information)

Case number(s): ☑ Divorce/finance ☐ Children ☐ Family Law Act

Our client is the Applicant in this Order

Cafcass

Pre-select paragraphs before creating the order

Disconnect familyorders.co.uk

*Financial Remedy Directions Orders (longer version) is processed on familyorders.co.uk*

When you click on the *Go to Family Orders* button, the Quantum Family Orders website will be loaded. You can then select the paragraphs you want to appear in the order. Your case data will be merged and a Word document created for you to edit.

Email address for sign-in: editor@classlegal.com ?

Password: tessie

☑ Show password

Connect to familyorders.co.uk

*1. Select the category of order and then the order itself from these dropdown menus*

*6. Click here every so often to ensure your orders library is up-to-date*

*2. The most likely court and case number is automatically inserted for you – change this if you need to*

*3. Select if your client is the Applicant or Respondent and (if relevant) if Cafcass or CAFCASS Cymru applies.*

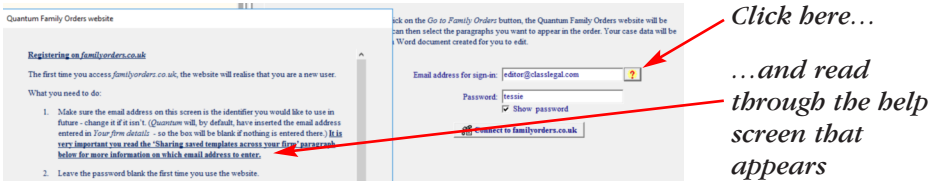
*4. Use this dropdown menu to select whether to choose the paragraphs you want in the order, or include them all (see later in this section for further details)*

*5. If you have chosen to pre-select your paragraphs make sure your account details are entered here (see later in this section for details on how to set up an account) and click to connect*

Once you've selected the order you want to create, you need to decide if you want to pre-select the paragraphs you want in the order (available for most commonly-used orders) or include all the available paragraphs for the order (and then delete those you don't want in Word later).

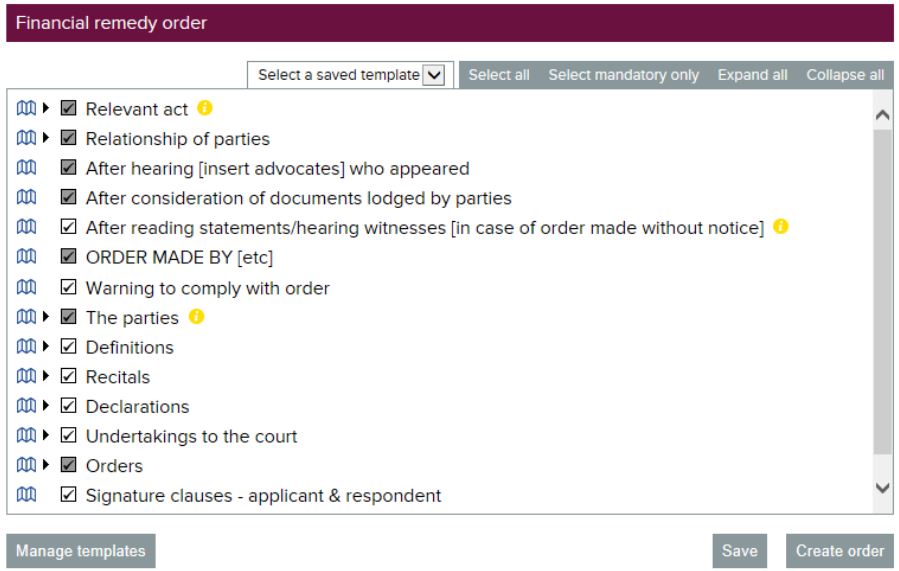
## *Pre-selecting your paragraphs*

To do this, you first need to set up an account at familyorders.co.uk, which is very straightforward. Click on the help icon for instructions:




Once your account is set up, you'll just need to click on the ***Connect to familyorders.co.uk*** button each time you want to select paragraphs.

When you're connected to the site you'll see a list of paragraphs for the order:




By default all the paragraphs are selected but collapsed (i.e. you can't see any sub-sections). Click on the relevant button to expand the list and/or to have only the mandatory paragraphs selected.

Choose optional paragraphs to go in your order by clicking the white box to the left of the paragraph.

Click on the blue book icon to view the text of a particular paragraph.

If you click on ***Save*** the website will remember your paragraph selection for that case.

## Creating, saving and loading templates

You may wish to re-use your paragraph selection for another case. You can save templates for each type of order. Then, when you open another case, you can load the pre-saved template.

To save your template, click on the ***Save template*** button at the bottom of the screen. You will be asked to name the template.

To load a template click on the ***Load from a template*** dropdown list box and select the template you wish to load. Note that the template will overwrite any current paragraph selection in force.

Use the ***Manage templates*** facility at the bottom of the screen to copy or delete templates.

## Sharing templates across your department/firm

If you and your colleagues wish to share the same templates then you should all use the same email address to login – for example *family@smith&jones.co.uk*. Note the email address must be one the site can send an email to, so you can click on the link and set the password to become a registered user, as above. (Note also that only one person can log into an account at a time, so if there

are many users creating orders regularly this might not work for you.)

**(Note: more detailed information than can be provided here can be found on the Resources section of our website classlegal.com, in *Family Orders help.pdf*)**

## *Including all paragraphs in the order*

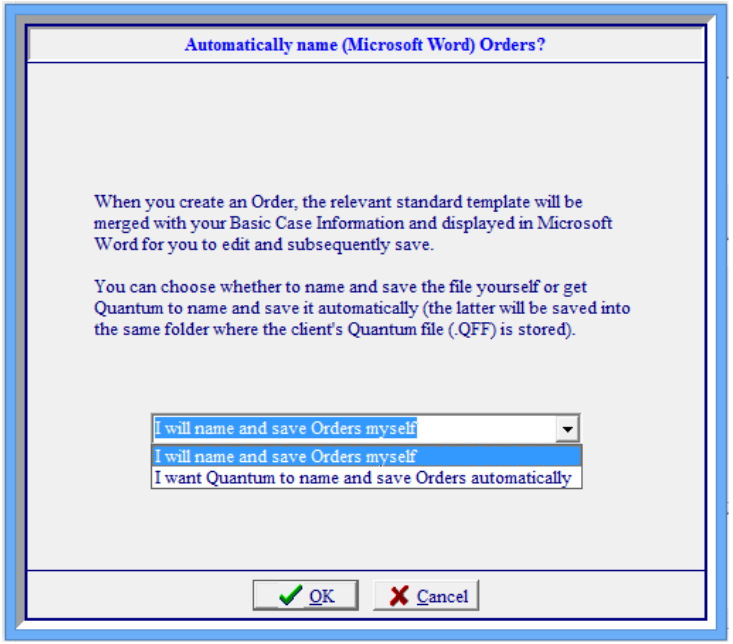
Use the drop down list boxes to decide on the order you wish to create.

Then just click on the ***Create a merged order*** button.

## *The order*

By default, **QUANTUM** will create an unnamed Word document which you then name and save (to your chosen folder).

If you want, **QUANTUM** can name and save the document for you automatically. It will save the file into the same folder where the QFF case you have open is stored. To turn this option on, go to ***Preference/Auto name (Word) orders*** and select the second option.




In either event, your order will open in Word.

*Financial Remedy Order*

**In the Family Court** **No: 06 D 100306**
**sitting at Lincoln**

**[The Matrimonial Causes Act 1973]**
**[The Civil Partnership Act 2004]**
**[The Child Support Act 1991]**
**[The Inheritance (Provision for Family and Dependants) Act 1975]**
*(Adapt as necessary)*

The Marriage of Jayne Marie Hillier and David Iain Hillier

After hearing [name the advocate(s) who appeared]
After consideration of the documents lodged by the parties
*(In the case of an order made without notice)* After reading the statements and hearing the witnesses specified in para [para number] of the Recitals below

ORDER MADE BY [NAME OF JUDGE] ON [DATE] SITTING IN [OPEN COURT] / [PRIVATE] [FOLLOWING A [RESERVED] / [WRITTEN] / [EX TEMPORE] JUDGMENT GIVEN ON [DATE]

Looking at the document you'll see that whatever data **QUANTUM** can merge into the order, it will have done (you'll see that in blue: in the example above, the Court name, case number and parties' names).

Anything left for you to fill in or decide how to deal with will be in red and any drafting notes in the original template are in green.

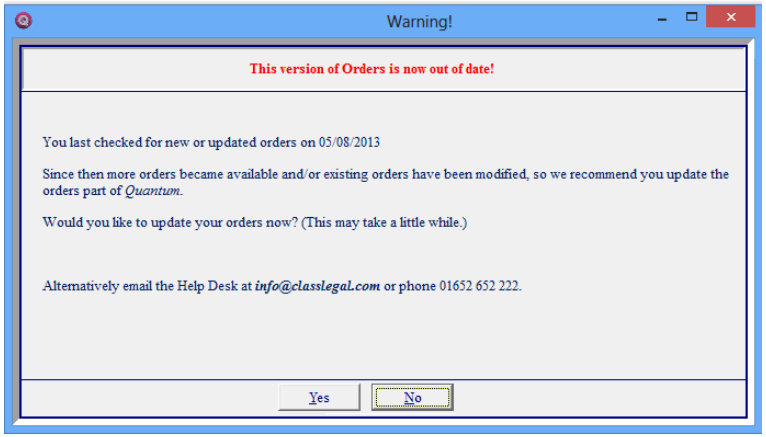
Amend the order in Word, and save it as normal.

## *Checking if new orders are available*

Because new template orders are released on an ongoing basis, we have decided to store the orders on our website (so you don't have to update a new version of **QUANTUM** each time a new order is available).

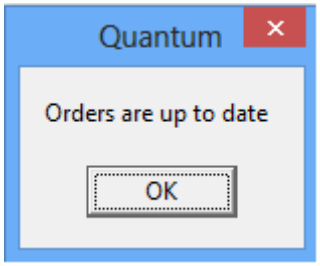
Each time you go into the ***Orders*** section it is worth clicking on 'Click here to check whether new orders are available'.

If they are, you'll then see a screen like this:



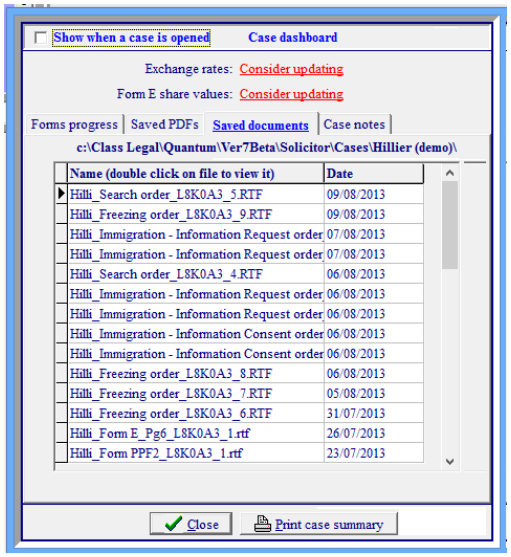

Follow the instructions and your list of template orders will be automatically updated,

If there aren't any new orders, you'll see this message:




## View merged orders

Click on ***View merged orders*** to see all orders that have been created for this case.




These are shown within the ***Case dashboard*** – see that section later in the manual for further information.

Double click on any of the orders shown to open it.

(Note that if you have changed the file name and removed the case code then it won't be listed here – see the section on the ***Case dashboard*** for more details.)

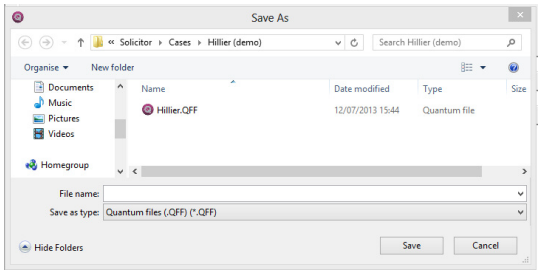
# Saving and printing

## Saving

### *Files*

**QUANTUM** files have an extension of .QFF.

We strongly recommend that you save your case frequently using ***File***, ***Save as*** … or ***File, Save***, as appropriate.




All the information for one case is stored in the same .QFF file. You don't need to have Smith Form E.QFF and Smith D8.QFF – all the forms can be held in the same file, Smith.QFF.

### *Reports*

You can save an individual form or report as either a ***pdf*** (Acrobat) or ***rtf*** (basic common word-processing format) file. This means you can then email the file to your client for them to open on their computer.

Click ***File/Save report*** and choose the format.

***** Please see the section on the Case dashboard for further help with this *****

## Emailing

As discussed above, if you save your form or report as either a pdf or rtf file you can then email it to your client for them to open on their computer.

(Your client will be able to look at and print the pdf file only – not change it in any way! They will be able to make changes to the rtf file.)

Select ***File, Save Report*** and choose ***pdf*** or ***rtf***. Select the form or tool to save and click ***OK***.

Choose the name and location where you wish to save the file.

Then create an email in your usual way and attach the rtf or pdf file you have just created.

***** Please see the section on the Case dashboard for further help with this *****

## Page breaks

On most data entry screens you can tick to insert a page break before that section.


## Blank forms

Don't produce a blank form by simply printing an empty case, as **QUANTUM** shrinks empty boxes and prints zeros in all the totals.

Instead, select ***File/Blank forms/Print***, then choose the form(s) you want to print. These forms have been specially formatted.

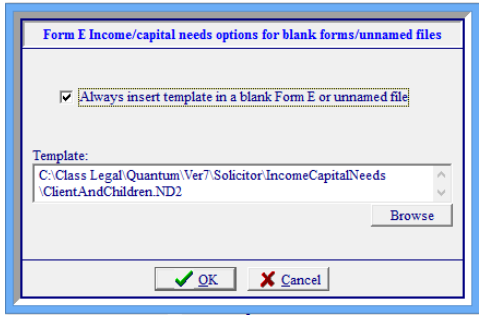
If you want to email to the blank form to your client, click ***File/Blank forms/Save as***, select the form and then save it as a pdf (Adobe Acrobat) or rtf (basic wordprocessing) file. Save the file into a directory, and then attach it to your email when you send it.

## Inserting income needs template

**QUANTUM** is set to put an income needs template into a blank or unnamed Form E.

This means that when you send or email your client a copy of the blank Form E to fill in, you will no longer have to attach a separate income needs schedule. It will make it much easier for you to subsequently enter the income needs (see the ***Income needs*** section earlier in this manual for further information).

To change this setting, or to choose a different template, go to ***Preferences/Income/capital needs*** options and check the box 'Always insert template in a blank form E or unnamed file'.




## Printing

When you want to print a form or forms, click on ***File*** then ***Print***.

Note that you have the choice of adding a watermark – i.e. 'Draft' or 'For dismissal purposes only' – on your form.

Select the form or form you wish to print and click OK. If you are

printing Form E you can decide if you want to print all or part of the form.

On the Print Preview screen that then appears, click on the printer icon in the top left to print.

### *Print preview*

At the top left-hand corner of most data entry screens, you will see this icon:

Click on this icon to 'print preview' the whole of that page. (If you the data extends over more than one page, there will be two (or more) pages to view.)

# Case dashboard

The ***Case dashboard*** has been designed to help you keep track of the forms and files you create for each case.

## A brief run through

Probably the best way to familiarise yourself with the ***Case dashboard*** is to look at the demo case we have created.

Go to ***File/Open*** and find the case `Hillier.QFF` in the following folder:

`C:\Class Legal\Quantum\Ver7Beta\Solicitor\Cases\Hillier` (demo)

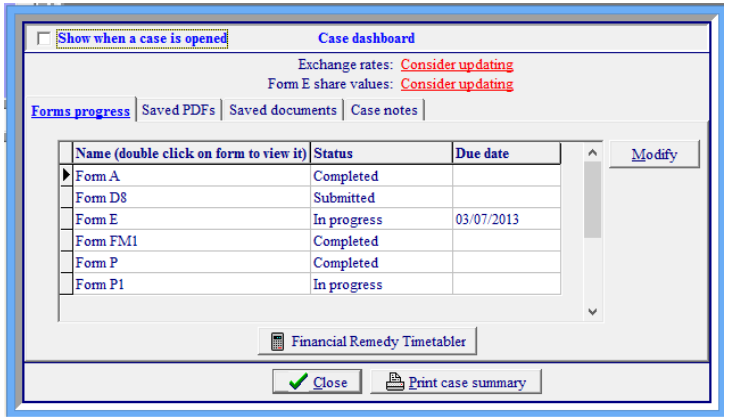
Tick on the blue button ***Case dashboard*** at the top of the Navigator.


You'll see that the tickbox on the top left isn't checked – tick it if you do want the ***Case dashboard*** won't appear automatically each time a case is opened (though people can change that setting themselves if they decide they do want it to appear each time).


### *Forms progress*

Have a look at the ***Forms Progress*** tab and you will see that there are already several forms in this demo case, set as either ***In progress*** or ***Completed***. (See later on in this section for how to set the status of a form.)

Double click on any form in the ***Forms progress*** tab and the relevant form will be opened (we hope this will save you time as we put more and more forms into **QUANTUM**!)

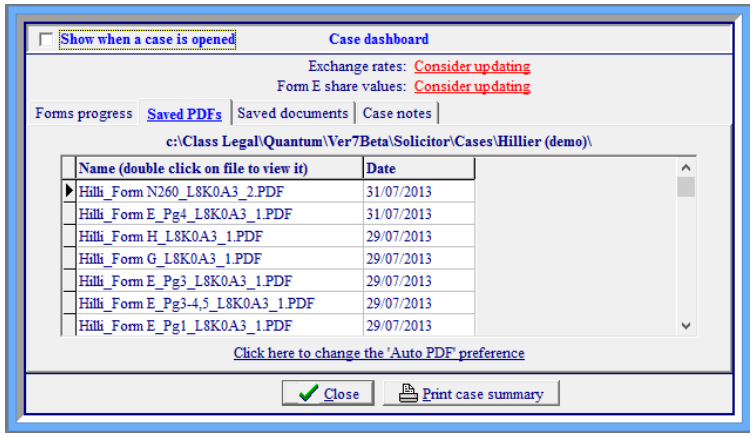



Add or edit a due date for each form by clicking on the 'Modify' button. (Note there is a link to the ***Financial Remedy Timetabler*** on this screen, so you can work out, from a hearing

date, when certain forms are due).

## Saved PDFs

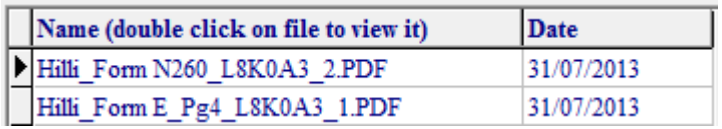
Go to the ***Saved PDFs*** tab – you'll find a list of the forms for this case that have been saved to PDF. (See ***Creating PDFs*** automatically later in this section for more detailed information on this.)




Note the L8K0A3 part of the filename. This is the 'key' which links all the PDF files to this demo case, Hillier.QFF. (See the section on ***Case code*** later in this section for more information.)

Double click on the PDF file and it will open in Acrobat Reader.

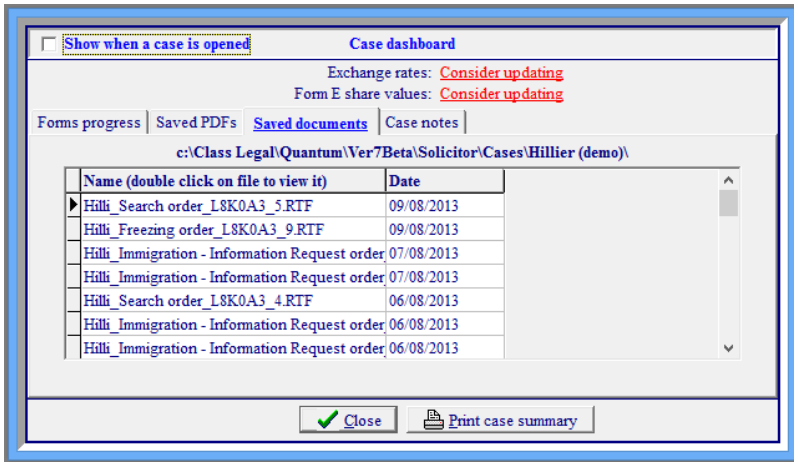
You can decide how to sort the PDF files by clicking on the column heading – i.e. to sort them by descending date order click on the date heading. **QUANTUM** will remember your settings and view the files according to your last choice.



| Name (double click on file to view it) | Date |
|---|---|
| Hilli_Form N260_L8K0A3_2.PDF | 31/07/2013 |
| Hilli_Form E_Pg4_L8K0A3_1.PDF | 31/07/2013 |

## Saved documents

Click on the ***Saved documents*** tab – you'll see the RTF, DOC and DOCx files associated with this case – they all have to have the case key in their filename if they are to appear here.




Click on a file and it will open in Word:

*Search Order*

**In the Lincoln County Court** **No: 06 D 100306**

**The Matrimonial Causes Act 1973**

**The Civil Partnership Act 2004**

**The Matrimonial and Family Proceedings Act 1984**

**The Senior Courts Act 1981**

Note that **QUANTUM** only saves to RTF but once you open the document in Word you can save it to DOC or DOCx. Once you

save the file in Word the file will automatically be added to your document management system. Remember that once you are in Word you have left **QUANTUM** and we have no control over what you do! (Though of course you will be able to open the file directly from **QUANTUM**.)

### *Case Notes*

Click on the ***Case Notes*** tab. Use this section to leave yourself reminder notes, or instructions for anyone else who may open up the file (i.e. a different fee-earner or secretary).

### *Case summary*

Click on the ***Print case summary*** button, and you'll see a summary of the forms progress, and the PDFs and documents saved for this case.

**Quantum Case Summary**
***Hillier.QFF***
**09/08/2013**

**Name of client:** Jayne Marie Hillier
Applicant in the application for a financial order/financial relief
Petitioner in the divorce

**Case number:** 06 D 100306

**Court:** Lincoln County Court

**Case notes:** Here - the user can type anything that he/she wishes the rest of the family team to see when they open up a case.

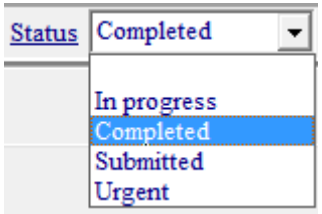
**Forms progress**

| Form | Status | Due date |
|---|---|---|
| Form A | Completed | |
| Form D8 | Submitted | |
| Form E | In progress | 03/07/2013 |
| Form FM1 | Completed | |
| Form P | Completed | |
| Form P1 | In progress | |

## Setting a form's status

Close the ***Case dashboard*** and select any form on the Navigator.

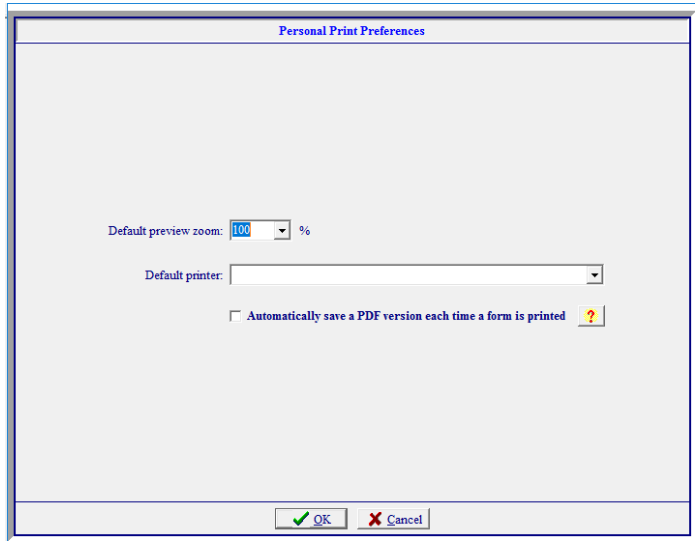
You can set, or change, the status of a form in the top right hand corner of the screen:




## Creating PDFs automatically

We suggest you make sure you read the section above, ***A brief run through***, before you read this section: it will make it easier to understand.

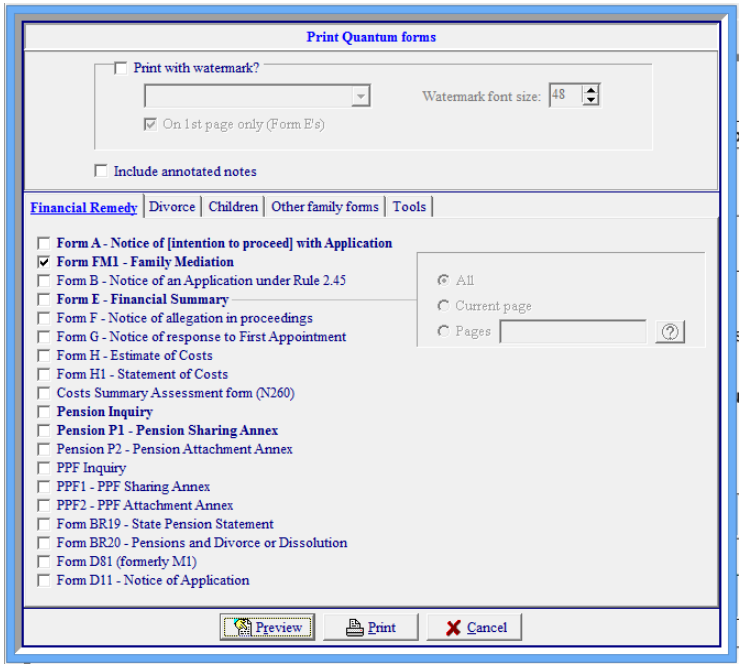
Click on ***Preferences/Personal print preferences*** and you'll see you can choose to save a PDF each time you print a form.




This feature is turned off by default – if you want **QUANTUM** to create PDFs for you automatically you will have to turn it on.

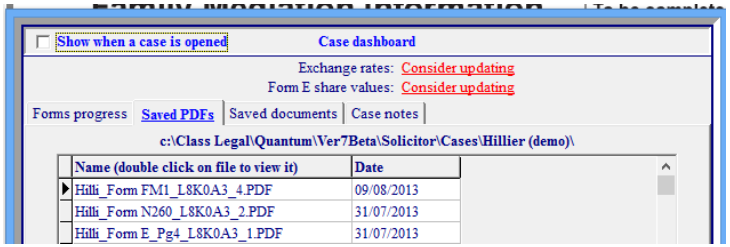
Do this by ticking the checkbox.

Now click on a form – let's say FM1 – on the Navigator, and select ***File/Print***.

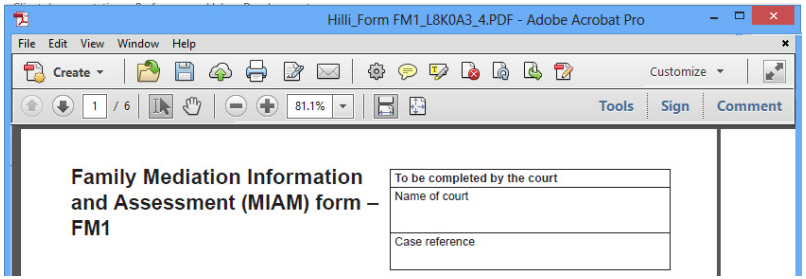



FM1 will already be ticked by default – check that it is and that no other forms are selected for printing. Click ***Print***.

Now click on the blue ***Case dashboard*** button and go to the ***Saved PDFs*** tab.

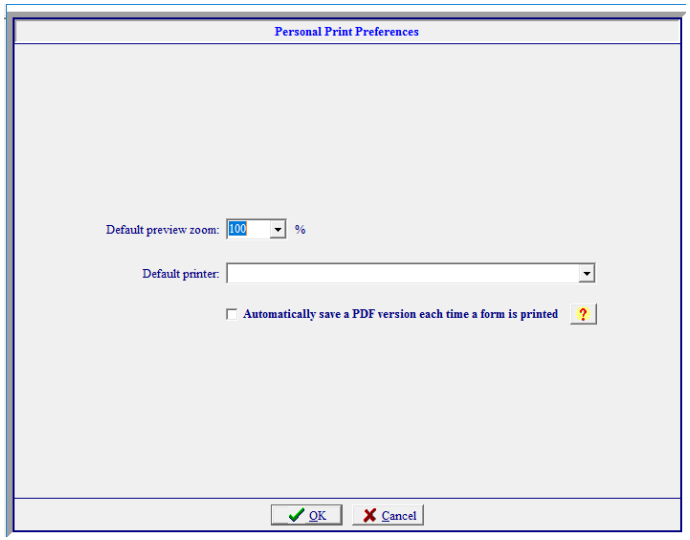



Note that FM1 appears in the list of saved PDFs. Double click on it to view it.



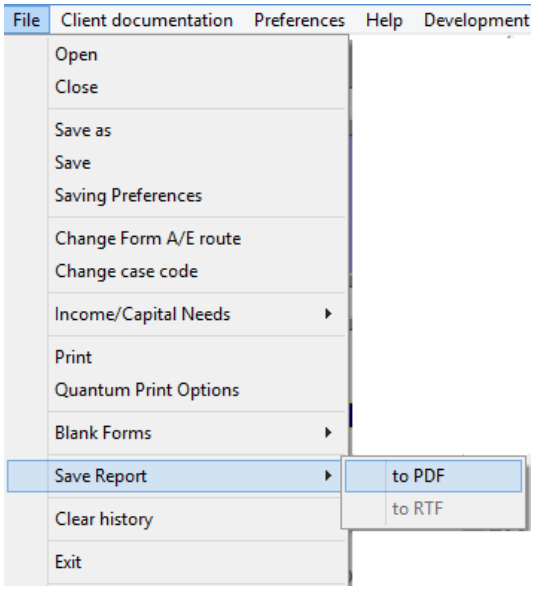

## Manually saving your PDFs

Select ***File/Personal print preferences***.

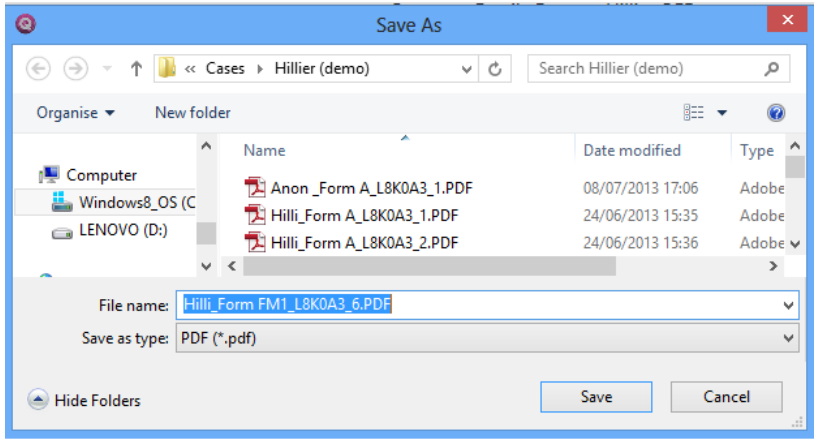



Turn the ***Auto PDF*** feature OFF and close the screen.

Select form FM1 on the Navigator and select ***File/Save Report to/PDF***.

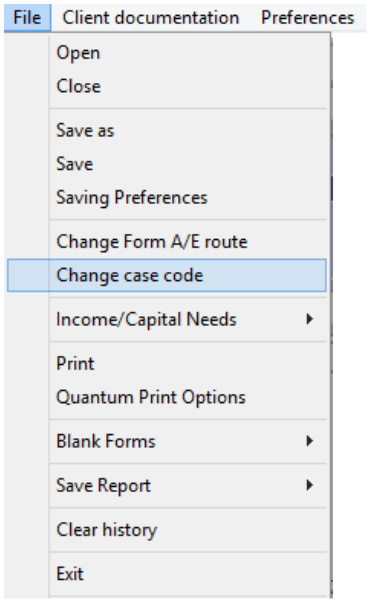



A screen appears asking you to name the file. Note that a default name has been provided. If you keep this name the file will appear in the ***Case dashboard***.




## Changing the case code

When you create a new case, **QUANTUM** will automatically generate a case code for it. Go to ***File/Change case code*** to view it.




Of course we can't dictate the way you organise your client files but we would expect all your client's documents to be stored in one folder dedicated to that client – so, for example, Jane Brown's documents will be stored in her client folder and Stuart Jones' documents will be stored in his.

If this always happened then we wouldn't need a case code to link all Jane Brown's saved documents together.

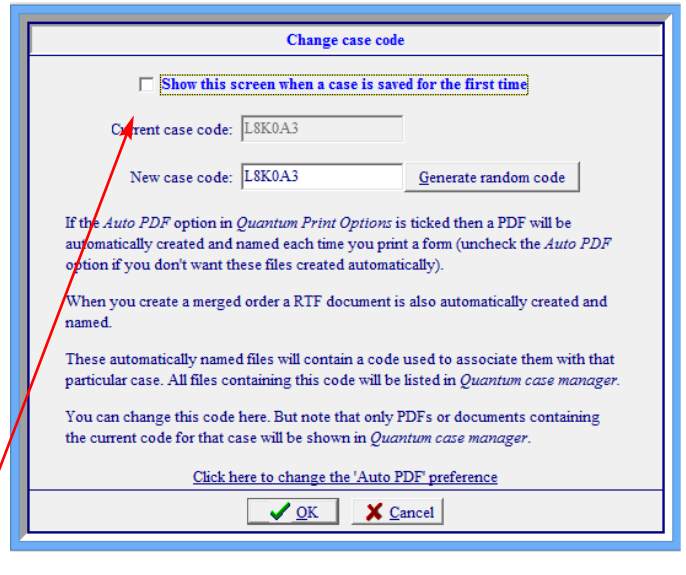
But in some firms documents are stored according to their document type. So Jane Brown's Form E would be stored in a folder named Form E, with the name `JaneBrownFormE.Qff` and Stuart Jones' Form E would be stored in the same folder with the name `StuartJonesFormE.Qff`.

The saved PDF and RTF files are, by default, stored by **QUANTUM** alongside the QFF files – and therefore **QUANTUM** needs to know which ones belong to Jane Brown and which belong to Stuart Jones. This is why we have an automatically generated ***case code***.

When you first save a new QFF file **QUANTUM** will create a random case code and store it along with all the other case data. This is a six digit alphanumeric code.

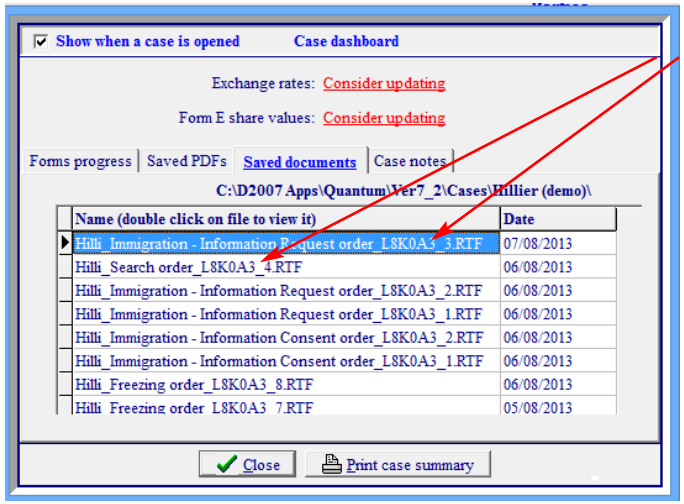
Although this happens happily in the background and automatically you can become involved if you want to and change the case key if you wish!

To do so, select ***File/Change case code*** from the Main Menu.




*If you select 'Show this screen when a case is saved for the first time' then this screen will appear automatically when you save a QFF file for the first time.*

Remember that this case code is the linking factor between the documents generated by **QUANTUM** – and that files will only appear in the ***Case dashboard*** if they contain the current code.




*Case code in the file names*

# Preferences

## Master data and preferences

See the section on p7 which covers this in detail.

## Print preferences saved with this case

Any new case you start will by default have the same print preferences as those set in ***Master data and preferences/Print preferences***.

However you can change those print preferences for a particular case by going here.

If a case has been started by another user, whose ***Master data and preferences/Print preferences*** are set up differently to yours and then you open the case, the print preferences will have travelled with the case – i.e. they will be those of the user who

created the case. (Though of course you can change them in this section if you want to.)

## Personal print preferences

These settings are completely personal to your computer, and WON'T travel with a case or be shared by anyone else.

Set here:

- your default zoom percentage for previewing forms
- your printer
- whether you want to save a PDF version each time you print a form (see page 43)

## Income/capital needs

Select here, both for Form E and Forms E1 and E2, whether to insert a needs template into your blank Form E or unnamed file. See ***Expandable forms/Income needs*** for more information.

## PDF/RTF reports

You can decide here whether you want to allow your clients to modify PDF or RTF reports you send them (the default is that they can't).

## Time savers

### *Child benefit*

Use this section to set **QUANTUM** to insert the full amount of child benefit in the ***Benefits*** section of your clients' Form E automatically.

You will be sent a **QUANTUM** update every year with the latest child benefit rates installed. (If for any reason they change before you receive an update, copy and paste them using the weblink provided.)

### *Share prices*

Use this section to set **QUANTUM** to insert automatically – or not – in your forms the date the share value was entered.

You can also set **QUANTUM** to remind you to update share prices, and select how old the valuation should be before the reminder appears.

### *State pension*

Use this section to set **QUANTUM** to insert state pension automatically in the ***State Benefits*** section of your clients' Form E (or the relevant ***Income*** sections in Forms E1 or E2) and selected in Basic Case Information.

Ensure you have the latest state pension rates installed (and cut and paste them using the weblink provided if not).

## Auto name (Word) orders

Select here whether you want to name and save your orders yourself (the default selection) or whether you want **QUANTUM** to do it automatically for you. See the section on ***Orders*** for further information.

## Navigator

Select ***Organise*** to switch the Form E display between sections and pages. ***Expand all*** and ***Collapse*** all show and hide respectively all the subsections of the forms.

## Screen appearance

**Quantum** has been designed to run on a screen resolution of at least 1024 x 768. However, some users may be using an old-fashioned resolution of 800 x 600, which magnifies everything on the screen.

**Quantum** will ensure that 800 x 600 screen resolution users will be able view everything they need to, but it may be more difficult to use. If your system is able to support higher screen resolutions than you are using, you may wish to take advantage of an option the program provides. This will allow you to run 1024 x 768 while you are in Quantum, but when you exit the program, your usual resolution will be restored.

If your DPI setting is not the default 96 dpi, then you may need assistance. Please ring our helpdesk on **01652 652 222**.

To check your screen settings and whether you can improve upon the appearance of your screen, click on ***Preferences*** then ***Screen appearance***.

## Document management systems

If you have a document management system which **Quantum** supports running on your machine you can integrate it with **Quantum** here. Please call our helpdesk on 01652 652 222 for help or to ask for our ***IT support document***.

# Quantum Client

**Quantum Client** is an innovative add-on to **Quantum**.

It lets you prepare your Form E more efficiently, by allowing your clients to enter as much of the information as they can themselves.

It works in four simple stages:

- Your client downloads the free **Quantum Client** software from the Class Legal website (or from your own site: see below) and then enter as much information as they can
- They then email the file back to you
- You import your data into **Quantum** – and then validate, amend and prepare your Form E as normal, without the need to retype any data
- You can return the Form E to your client to check, having decided whether to let them change the Form E itself or make annotations onscreen only

## What to tell your client

### *Installation*

Either:

1. Tell your client to go to www.quantumclient.co.uk, where they can download **Quantum Client** for free

Or:

2. Copy the **Quantum Client** logo from www.quantumclient.co.uk, and put it on your department web page, linking it to www.quantumclient.co.uk. Then you can simply refer clients to your own website, and they can follow the link from there.

In each case, the client can use the program free of charge for 35 days.

### *Choosing a Form E route*

**QUANTUM CLIENT** displays only Form E (not Form E1 or Form E2) on the navigator.

If you do want them to complete a Form E1 or E2, they need to go to ***File/Change Form E type*** and make their selection there. **QUANTUM CLIENT** makes it clear that they should only do this under specific instruction from you.

## How the process works

1. **Client enters the initial data**

   Let's assume you have asked your client to enter the initial data for their case (though you can start the process by sending them a Form E you have partially completed – see step 3 below).

   The client enters as much data as they can, with help from the client specific screens and manual.

   (Note that parts of section 0 and all of sections 5 and 6 have been disabled in **QUANTUM CLIENT**, as it is more appropriate for the solicitor to enter this data than the client.)

2. **Client emails the file back to you and you amend it**

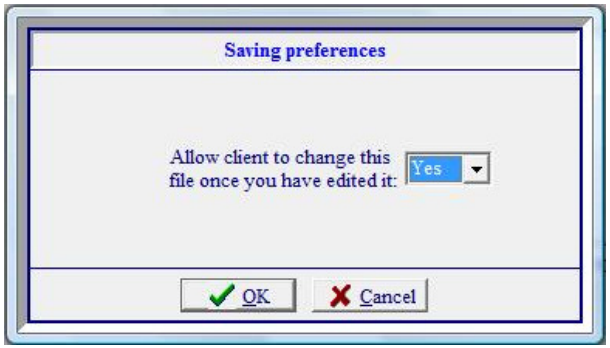
   They email the file back to you as an attachment, and you download it into the appropriate directory.

   You open the case in **QUANTUM PREMIUM**, and amend and add to the data as required.

3. **If you are returning the file to the client, decide your saving preference**

   Decide if you want your client to be able to amend the Form E itself, or merely to attach comments to it (see the section ***Using the Notes facility*** below).

   Go to ***File/Saving preferences*** and select Yes or No.




   If you select 'Yes', when you email the file back to your client, and they open it in **QUANTUM CLIENT**, they can amend the data in Form E as they wish (as well as adding notes). That means if they then send it back to you, and you decide to overwrite your existing file with the one from them, the Form E may well have changed.

   If you select 'No', they will not be able to amend the data directly, but only to create notes.

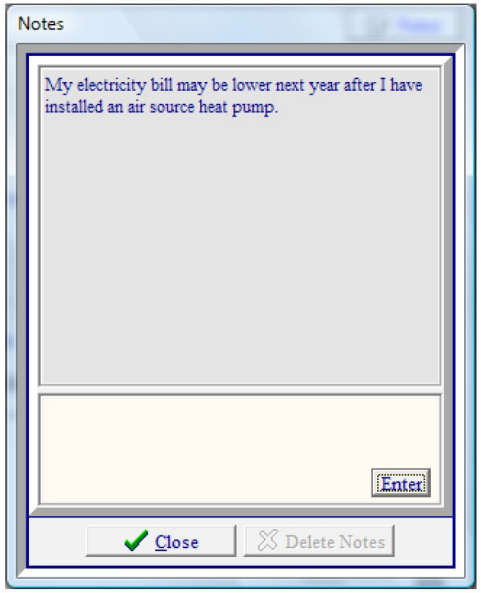
4. **Using the Notes facility**

   This is useful if either you or your client want to make comments to each other, without having that text showing on the Form E itself – for example if you want to ask your client for any further information. Think of it as post-it notes stuck onto the form.

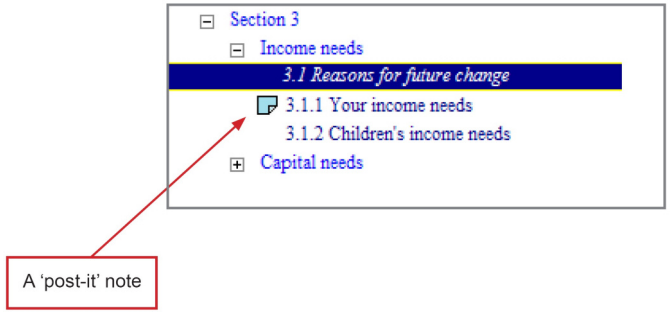
   Each of you will be able to create and reply to notes when you receive the file from the other.

   Click on the ***Notes*** icon at the top right of your screen.


   You'll see that you enter text by typing into the cream box, and then clicking ***Enter***. (You can edit previously entered notes by double clicking on the grey box.)




You will be able to see where there are any outstanding ***Notes*** by looking for the pale blue 'post-it' notes on the ***Navigator***. Click on these ***Notes*** to see any comments – and add to them as you wish.




When you have dealt with a particular note, you'll be able to delete it.

To print the ***Notes*** (so you can keep them on your client file for example), tick the box 'Include annotated notes' when you go to ***File/Print***.