TM10 Assessment, Development, and Administration Code Set

Fact investigation and development, analysis and strategy, document and file management, and budgeting.

TM10.10 Fact Investigation and Development

Investigating and understanding the facts of a matter. Includes initial meeting to discuss new matter, interviewing client personnel and potential witnesses, reviewing documents to learn the facts of a potential case, working with an investigator, and all related communications and correspondence.

TM10.15 Analysis/Strategy

The thinking, strategizing, and planning for a case. Includes discussions, writing, and meetings on case strategy. Also includes initial legal research for case assessment purposes and legal research for developing a basic case strategy.

TM10.20 Document/File Management

Creating and populating document and other databases or filing systems. Includes the planning, design, and overall management of this process.

TM10.25 Budgeting

Developing, negotiating, and revising the budget for a matter.

TM10.30 Other Assessment, Development, or Administration

The assessment, development, administration and other activities that cannot be included under another category.

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