



Introducing Prevail 9

Continuing Prevail's 30 years of outstanding Case Management, Prevail 9 is the most significantly upgraded version of Prevail. Don't be fooled by the flashy Web-only Case Management Systems. They may be pretty and convenient to use, but they do only a fraction of what Prevail can do for you. Combined with our best-in-class customer support, one-on-one online training program, targeted feature Webinars, Prevail User Group conferences, and excellent Support Plans, Prevail keeps on giving long after you purchase the license.



Backend Database: Much of the improved performance and security comes from the database backend, which has been completely overhauled. No more having to purchase Advantage Database Server licenses in addition to Prevail licenses.



Document Package: This popular feature has been significantly enhanced and includes direct merge to PDF.



Client Portal: Securely message and pass documents with your clients.



EREtrieve: For SSA Firms, interact with the Electronic Records Express (ERE) right from Prevail. Exhibit files are enhanced with character recognition to make them searchable, and a table of contents is generated. Downloaded files go directly into the appropriate matter. Other features include uploading documents to the ERE, Hearing Status Reports are regularly updated to keep you informed, ERE interaction can be incorporated into the Process Builder workflow, and more.



Online Intake Forms: Gather your intakes using online forms that import into Prevail. These can be linked to your firm Website and customized for your firm.



New Calendar Functions: Create calendar groups and save them and choose to see a combined calendar for any group of people or see them individually side-by-side.



Improved Insurance Branch Advocacy Referral Program: For SSA firms, refer your closed cases to Insurance Branch right from Prevail. They will help your claimant with getting the proper Medicare program. Your firm receives compensation for this (generally \$100/referral) regardless of the claimant's Medicare Plan selection.



More Modular: We will continually add new integrations and features to Prevail 9, eliminating the hassle of upgrading to a new version.



Two Cloud Storage Options: Our Standard Cloud Option allows Prevail and MS Office to reside in the Cloud. Our Premium Cloud Option allows all of your apps to reside in the Cloud (Virtual Desktop), so you only need inexpensive PCs (commonly called 'thin clients').



Color Organization: Use colors to organize your firm's History data. All employees will see the same colors, which will help standardize data visualization.



Report Builder: Use our new report writer to create your own reports without having to request them from our reports team. Control what fields are added, sorting, grouping, totals, exporting and more.

Some features require Prevail Annual/Premium Support, and others may incur additional fees (though will more than pay for themselves with the efficiency increases). Some are completely free. Ask us about details!

Email upgrades@prevail.net for more information or visit our [calendar](#) to schedule a demo.