



Classification:
Patent

PT10 Assessment, Development, and Administration Code Set

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

- PT10.10 **Fact Investigation and Development**
Investigating and understanding the facts of a matter. Includes interviewing of involved personnel and potential witnesses, reviewing documents to learn the facts of a potential case, working with an investigator, and all related communications and correspondence.
- PT10.15 **Property and Exemplars**
Collecting, handling and storing property and exemplars (models or exhibits). Includes lifecycle management, procurement, storage, tracking location, and managing case billing information.
- PT10.20 **Analysis/Strategy**
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.
- PT10.25 **Document/File Management**
Creating and populating document and other databases or filing systems. Includes the planning, design, and overall management of this process.
- PT10.30 **Budgeting**
Developing, negotiating, and revising the budget for a matter.
- PT10.35 **Other Assessment, Development, or Administration**
The assessment, development, administration and other activities that cannot be included under another category.