

**COMPUTERIZED NETWORK SYSTEM
FOR INITIATING, FACILITATING, AUDITING,
AND MANAGING COMMUNICATIONS AND DOCUMENTS
INVOLVING PROFESSIONAL EXPERTISE**

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Reference to Related Applications

This application is a continuation-in-part of PCT/US18/57099 (filed 10/23/2018), which
10 claims the benefit of the filing dates of U.S. Non-Provisional Application No. 16/041,070 (filed
07/20/2018) and U.S. Provisional Applications Nos. 62/596,192 (filed 12/08/2017), 62/629,354
(filed 02/12/2018), 62/632,718 (filed 02/20/2018), and 62/668,496 (filed 05/08/2018), the
disclosures of which are incorporated herein by reference.

15 **Field of Invention**

The present invention relates generally to the fields of networked digital communications
and documents and computerized systems for initiating, facilitating, auditing, and managing such
communications and documents, and more particularly to applications of such systems to
communications and documents involving one or more fields of professional expertise.

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Background of the Invention

When a lay person is seeking advice or explanations concerning a professional discipline,
such as law or medicine, or regarding documents relating to that discipline, the time and expense
involved in making an appointment with a qualified professional can be an inhibiting factor.
25 Conversely, professionals are often reluctant to give informal advice because of potential

liability issues involving the content of the communications, possible conflicts-of-interest and confidentiality.

While various websites offer information and/or respond to questions pertaining to professional expertise, the ability of the inquirer to interact in real time with a qualified professional is absent or very limited. Ethical constraints can also make it difficult for professionals to initiate direct communications with members of the public with whom they have had no previous relationship.

This state of affairs works to the disadvantage of both inquiring lay people and potentially helpful professionals. The former are deprived of information vital to their personal and financial affairs, and the latter lose the opportunity to interact with potential clients or patients.

The present invention responds to this dilemma by providing an integrated computerized system using downloadable and web-based application software (“Apps”) to initiate, manage and track exchanges of information and documents between lay users, including both individual and business enterprises, and qualified professionals, as well as between and among individual and enterprise users themselves. The features of the Apps, as described further herein, assure that all such interactions proceed in accordance with all applicable legal and ethical requirements for obtaining users’ informed consent and protecting users’ confidential information. Compliance with such requirements is documented by an audit trail compiled by the Apps and stored in a system database for the protection of both participating users and professionals, so that impediments to the flow of information and guidance on professional topics are minimized.

Summary of the Invention

The system of the present invention comprises a computerized network which links individual lay users, hereinafter referred to as “standard users,” with qualified professionals in one or more disciplines, such as law, medicine, engineering, accounting and architecture, who are hereinafter referred to as “participating professionals.” Business entities, such as corporations, partnerships and limited liability companies, can also participate as “enterprise users,” with linkage through the network to both standard users and participating professionals.

For standard users, the system provides a downloadable native User App, which runs on a smartphone, tablet or other personal computing device (hereinafter collectively referred to as a “pc device”). Enterprise users participate through a Web App, which runs on a web platform maintained by the System Server. Participating professionals are provided with a downloadable native Professional App, which runs on a pc device and links to the Web App.

The hardware architecture of the system network **110** is depicted schematically in **Fig. 1**, which shows the standard user pc devices **111**, enterprise pc devices **112**, professional pc devices **113**, the connecting internet **114**, the System Server **115**, and the System Database **115A**. As will be explained subsequently herein, the system network **110** also enables private communications path **116** between a standard user **111** and a professional **113** with whom the standard user **111** has established a client or patient relationship, so as to protect the confidentiality of client/patient information.

The User App provides a top menu comprising a User Login page, a Home Screen and a User’s Tool Menu. The User’s Tool Menu comprises option tabs for Connect, Profile, Files, Upload, Chat, and Professional Services. The Connect option enables standard users to engage with other standard users and enterprise users in discussion forums, categorized by topics and

hashtags relating to the relevant professional discipline. Through the Profile tab, users manage their personal settings, as well as app notifications and alerts.

Under the Files tab, the user can view the status of documents, highlight terms within a document for definition, open a live chat with a professional from within the document, or agree
5 to the document by voice (VoIP) recording or touch screen confirmation. In the Chat option, users can open a live chat consultation with a qualified professional by selecting a professional discipline and a specialty area within that discipline. The “in-App calling” feature allows the user and/or the professional to select a live chat mode of text, VOIP call or video chat. Documents and files relevant to the professional consultation can be uploaded via the Upload
10 option, and the user can highlight sections of a document or file to which their inquiry pertains.

When the standard user shares files and/or documents with participating professionals, the User App advises them of their privacy rights and obtains their informed consent to the information disclosures. All shared user information and user-professional communications are recorded and preserved in an audit trail, the immutability of which can be protected using
15 blockchain technology.

The User and Professional Apps restrict access to shared user information and user-professional communications to the respective user and professional and maintain an immutable audit trail of the confidential handling of such information and communications. In the event a user enters into a formal client or patient relationship with a participating professional, the Apps
20 route subsequent communications and information disclosures on a private basis between the user and the professional.

The Professional App provides a top menu comprising a Professional Login Page, a Home Screen and a Professional’s Tool Menu. The Professional’s Tool Menu comprises option

tabs for Web App link, Profile, Files, Chat, and Proposals. The initial Professional Login includes a setup of the Professional App, which elicits the professional's qualifications, specialty areas, experience, and permissions/licenses, as well as billing information and terms associated with their participation in one or more of the service plans provided by the system.

5 Under the Files option, the professional accesses a list of documents and files relating to standard users with whom he/she has interacted, sees the status of each document/file, displays the entire document/file, and receives prompts for actions required in connection therewith. From the Chat tab, the professional accesses an itemized list of chats they have open with standard users and enterprise users (through the Web App). A specific chat item can be selected
10 to open a chat window with the respective user. The Professional App incorporates informed consent, confidentiality and audit trail features corresponding to those described above with reference to the User App.

Enterprise users access the system network through the Web App, which is also accessible to professionals. The Web App has a top menu comprising a Login Page and a
15 Dashboard Main Menu. Initial setup of an enterprise account involves selection of a service plan and associated billing information. The Dashboard enables the enterprise user to upload documents, including legal agreements, which are intended for one or more standard users. The system offers plan services that include staff review of enterprise documents and identification of problems needing corrective action. Depending on the selected service plan, document review
20 can include consultation with a staff lawyer regarding legal issues pertaining to the document.

The Web App also includes a Group Chat option, through which enterprise users can engage in group chats with multiple invited standard users, professionals and/or other enterprise users. The Group Chat option allows the participants to choose between chat modes of text,

VOIP or video chat. Invited parties must sign a Non-Disclosure Agreement (NDA) uploaded by the initiating enterprise user prior to joining the group chat. Within the group chat, documents can be shared by the initiating enterprise user.

The present invention also provides a platform for the initiation of professional services agreements between participating professionals and standard and/or enterprise users. The User App and the Web App each have a Professional Services Menu, by which a standard or enterprise user can request that participating professionals submit proposals for specified professional services, through a Proposals Menu in the Professional App. Conversely, the Proposals Menu of the Professional App also enables the participating professionals to offer specified professional services at specified fixed fees to standard and/or enterprise users, who can accept the offers through the Professional Services Menu of the User or Web App.

The User App and the Web App also incorporate, under the Professional Services Menu, a Proposal Qualification/Evaluation option. In the Proposal Qualification/Evaluation option, a standard user or an enterprise user can specify minimum qualifications for participating professionals submitting proposals and/or multiple proposal evaluation criteria, by which the App can generate a “short list” of qualifying proposals and/or a ranking of proposals based on the evaluation criteria.

In many instances, the documents associated with professional services comprise forms, which are generated and periodically updated by governmental or private entities. The present invention incorporates software which automatically updates all such professional forms, either through subscription arrangements with the relevant issuing entities or by release-date downloads from the websites of the issuing entities. Similarly, professional services are impacted by changes in regulatory requirements and standards. Accordingly, the software

system of the present invention automatically notifies affected participating professionals of such regulatory changes, which are obtained through subscription arrangements with the relevant regulatory and standards-setting entities or by notice-date downloads from the websites of such entities.

5 The present invention enables participating professionals and their clients to communicate, share information, and negotiate and/or create documents relating to the professionals' expertise and services. It enables auto-completion of forms across multiple professional practices and seamless referrals between different professional practices through a process which integrates and audits compliance with applicable requirements of informed
10 consent and confidentiality. It opens a communication channel, including live chat, between the professionals and their clients and generates an immutable audit trail of ensuing transactions and interactions. The system also provides for the simplification and clarifications of terminology via these communications by providing simple definitions for particular terms with which an end user is not familiar.

15 The foregoing summarizes the general design features of the present invention. In the following sections, specific embodiments of the present invention will be described in some detail. These specific embodiments are intended to demonstrate the feasibility of implementing the present invention in accordance with the general design features discussed above. Therefore, the detailed descriptions of these embodiments are offered for illustrative and exemplary
20 purposes only, and they are not intended to limit the scope of the foregoing summary description.

Brief Description of the Drawings

Fig. 1 is a schematic diagram of the hardware and network architecture of the present invention;

Fig. 2 is an exemplary flow chart of one embodiment of the User App of the present invention;

Fig. 3 is an exemplary flow chart of one embodiment of the Professional App of the present invention;

Fig. 4 is an exemplary flow chart of one embodiment of the Web App of the present invention;

Figs. 5A & 5B are exemplary wireframes for the “Connect Threads” screens of one embodiment of the User App of the present invention;

Figs. 6A-6D are exemplary wire frames for the “My Cases” screens of one embodiment of the User App of the present invention;

Figs. 7A & 7B are exemplary wireframes for “Live Chat” screens of one embodiment of the User App of the present invention;

Fig. 8 is an exemplary wireframe for a lawyer’s professional home screen in one embodiment of the Professional App of the present invention;

Figs. 9A-9C are exemplary wireframes for enterprise “Document” screens in one embodiment of the Web App of the present invention;

Fig. 10 is an exemplary wireframe for an enterprise “Group Chat” screen in one embodiment of the Web App of the present invention;

Fig. 11 is an exemplary flowchart of wireframes for enterprise-to-enterprise referral screens in one embodiment of the Web App of the present invention;

Fig. 12 is an exemplary detail of the User App flowchart of **Fig. 2**, showing the “Professional Services” submenu;

Fig. 13 is an exemplary detail of the Professional App flowchart of **Fig. 3**, showing the “Proposals” submenu.

5 **Fig. 14** is an exemplary detail of the Web App flowchart of **Fig. 4**, showing the “Studies” submenu;

Figs. 15A-15C are exemplary wireframes for the “Study Management” screens of one embodiment of the Web App of the present invention;

10 **Figs. 16A-16C** are exemplary wireframes for the authentication of study participants and professionals according to one embodiment of the Web App of the present invention;

Figs. 17A-17B depict an exemplary information architecture for an exemplary Studies Menu tailored for clinical trials of new pharmaceutical products;

Figs. 18A-18C depict exemplary wireframes corresponding to the Q&A component of the exemplary Studies Menu tailored for clinical trials of new pharmaceutical products;

15 **Figs. 19A-19C** depict exemplary wireframes corresponding to the Messaging component of the exemplary Studies Menu tailored for clinical trials of new pharmaceutical products;

Figs. 20A-20E depict exemplary wireframes corresponding to the Documents component of the exemplary Studies Menu tailored for clinical trials of new pharmaceutical products;

20 **Figs. 21A-21B** depict exemplary wireframes corresponding to the Settings component of the exemplary Studies Menu tailored for clinical trials of new pharmaceutical products; and

Figs. 22A-22E depict exemplary wireframes corresponding to the Study Management component of the exemplary Studies Menu tailored for clinical trials of new pharmaceutical products.

Detailed Description of the Preferred Embodiment

Referring to **Fig. 2**, an exemplary flow chart for one embodiment of the User App **210** is depicted. In the Login screen **211**, the standard user logs in with a username and password, if the user has an existing account **212**. If not, the user creates a new account **213 214**, he/she is guided through setup **216** of the User App **210**. Professionals and enterprise users are redirected **215** to the Professional App **310** and the Web App **410**, respectively.

Upon login **211** to an established account **212 216**, the User App **210** opens the Home Screen **217**, which defaults to a display of any “Connect” **221** chats that the user has opened or participated in. If the user has any alerts requiring action **218**, he/she will select the appropriate option **219** from the User’s Tool Menu **220** to deal with it. If not, clicking on the “Connect” button **221** directs the user to an itemized list of topics **226** being discussed by other standard or enterprise users. Users can search by topic or hashtag for existing topic discussions via a search bar at the top of the page. Exemplary wireframes for these “Connect Threads” screens are depicted in **Figs. 5A and 5B**. Users can start a new thread **227** by tapping the “Start a new thread” at the bottom of the screen.

Through the Profile tab **222**, users manage their personal settings **228** and alerts **229**. Here they can toggle alerts from “Connect” **221**, “My Cases” **231** and “Chat” **225** on and off. And here they can also access User App Support **230**, to report problems or upgrade/downgrade their account.

Under the Files option **223**, users can look up “My Cases” **231** to view legal documents they have signed or need to sign, as well as private group chats to which they have been invited by an enterprise user. Legal documents are displayed in an itemized list **232** identifying the

issuing business name and the date when the document was sent to the user. Upon clicking on any document on the list **232**, the user displays the full document **233** and can highlight terms within the document for definition or open a live chat with a professional, such as a lawyer. If the document requires his/her signature, the user can agree to the document by VoIP recording, touch screen signature, or one touch confirmation. Exemplary wireframes for these “My Cases” screens are depicted in **Figs. 6A-6D**.

Using the Upload option **224**, users can upload scanned or saved files and documents **234**. The User App provides OCR to convert scanned images into readable text. When a user highlights terms in a document **235**, the App pulls definitions from search engines, websites and/or databases and displays them. The definition display allows the user to elect a “depth” of definition of the subject terminology, ranging from a brief dictionary-type definition to an expanded analysis of the terminology with examples of its usage. Optionally, the definition display can include an audible narration component explaining the terminology and/or an animation figure or character giving an audible explanation of the terminology. Users can also highlight sections of a document to refer to while requesting the assistance of a professional **236**, such as a lawyer, through the App’s Chat feature **225**.

Through the Chat feature **225** of the User App **210**, users can open a live chat with a qualified professional. The user selects a professional discipline **237**, such as law, and then selects a specialty area or topic **238** from a list of categories. The user and/or professional can select a chat mode **239** of text, VoIP call or video chat. Exemplary wireframes for “Live Chat” screens specific to a lawyer are depicted in **Figs. 7A** and **7B**. With respect to shared user information and communications in the Files **223**, Upload **224** and Chat **225** operations, the User

App 210 informs the user of his/her privacy rights and records the user's informed consent 240 in an immutable audit trail 241.

Referring to **Fig. 3**, an exemplary flow chart for one embodiment of the Professional App 310 is depicted. From the Login screen 311, the professional with an existing account 312 logs in with a username and password. Otherwise, a new account is created 313, and the professional is guided through App Setup 314, in which profile 315 and billing information is supplied and terms of service agreed upon. In either case, after Login 311 the App 310 opens a Home Screen 316, which initially displays an itemized list of the professional's chats, with the most recent appearing first. An exemplary wireframe for a lawyer's professional Home Screen is depicted in **Fig. 8**.

At the bottom of the Home Screen appears the Professional's "Tool Menu" 319, which includes links to the Web App 320, Profile 321, Files 322, Chat 323, and Proposals 335. If the professional has any alerts requiring action 317, he/she will select the appropriate option 318 from the Tool Menu 319.

Through the Profile tab 321, professionals manage their personal settings 324 and alerts 325. Here they can toggle alerts from "Chat" on and off. These alerts comprise new events that arise in one of their chats, including new chat requests that fall within their area of professional expertise, new messages from existing clients/patients, and VoIP or video chat calling alerts involving existing clients/patients. And here they can also access Professional App Support 326, to report problems or upgrade/downgrade their account.

Under the Files option 322, professionals can upload legal documents 327, such as attorney retainer agreements which they have extended to standard or enterprise users who want to contract for their services. They can display an itemized list of time-stamped documents 328,

indicating which have been agreed upon by clients/patients and which are still pending. Upon clicking upon a listed document, full documents details are displayed **329**. Professionals can toggle between “agreed” and “pending” to view users who have agreed or not to that document. They can also click on “pending” to send reminders to users who have not yet agreed to the
5 document.

Through the “Chat” line **323** on the Home Screen **316**, the professional views an itemized list **330** of chats they have open with standard and enterprise users. The list **330** shows the user’s name and chat topic, along with the first 25 characters of the last message and a time stamp of when the message was sent. Clicking on one of these chats allows the professional to open a
10 chat window **331** with the user. The professional and/or the user can select a chat mode **332** of text, VoIP call or video chat. With respect to shared user information and communications in the File and Chat operations, the Professional App informs the user of his/her confidentiality rights and records the user’s informed consent **333** in an immutable audit trail **334**.

The information exchanged and documented in the “Files” and “Chat” section of the App
15 **310** are private and visible only to the following parties through the following channels:

1. **End User.** The end user’s files are only visible to their respective account accessed via their User App username and password.
2. **Enterprise Account.** All legal documents signed by an end user can be viewed/stored by the enterprise account that extended the document for the end user
20 to sign. This includes administrative accounts for that specific enterprise account.
3. **Professional.** When an end user reaches out for assistance from a professional, they consent to share their personal information and information contained in their respective documents with that professional.

4. **Group Chats.** Group chats are opened only by an enterprise account. Only other enterprise accounts, professionals and standard users invited by the initiating enterprise account can view and access these group chats. Invited parties must sign an NDA or equivalent uploaded by the initiating enterprise account prior to joining the group chat. Within this group chat, documents can be shared from the initiating enterprise account with the members within the group chat.

Referring to **Fig. 4**, an exemplary flow chart for one embodiment of the Web App **410** is depicted. The Login **411** procedures for existing accounts **412** and new account creation **413** are followed, and an enterprise account is Setup **414**, with selection of services **415** and billing information.

After Login, the App opens to Dashboard Main Menu **416**, with links to the Summary Sidebar **417**, Profile **418**, Documents **419**, Chat **420**, and Professional Services **436**. The Summary Sidebar **417** provides alerts from plan staff regarding potential problems with an enterprise user's current legal documents. The Summary Main Dashboard **421** shows all documents **422** sent to standard users for signing, broken down into three categories: (1) "All" **423**, listed with newest first and showing document name, date sent, username of recipient, and whether the user has agreed to the document; (2) "Agreed" **424**, showing only signed documents, with the newest listed first; and (3) "Pending" **425**, showing only documents that have been sent to the end user but not signed.

Enterprise users can click on the username to display the document name, the full document, the user's digital signature, a saved VoIP agreement, or a verified one tap agreement. Each of these will display as red prompts if the client has not signed the document via that channel.

From the Profile submenu **418**, the enterprise account can manage its administrator settings **426** and edit its profile information **427**.

The Documents submenu **419** provides a list of all documents **428** uploaded by the enterprise user to be sent to standard users engaged by the enterprise. The document list displays
5 the document name, upload date and plan status **429**. A green indicia indicates that plan staff have reviewed a legal document and found it sufficient to be issued to a standard user engaged by the enterprise account. “Action Needed” indicates that legal issues exist with the document and that a plan lawyer should be consulted. Clicking on the document will populate the Main Dashboard **416** with the complete document so that it can be viewed. From the Dashboard **416**,
10 live chats with plan staff **430** and/or staff lawyers can be opened. Exemplary wireframes for enterprise “Document” screens are depicted in **Figs. 9A-C**.

The Chats submenu **420** provides an itemized list of group chats **431** opened by the enterprise account. For each group chat, the App displays the group name, start date, time stamp for most recent activity, and active/inactive status. When a group chat is clicked, the full chat
15 opens in the Main Dashboard **416**. Comments are displayed in chronological order, and a text field enables the enterprise account to participate in the chat. The enterprise account can engage plan staff in one-on-one chat regarding the group chat. The enterprise account can add new participants **432** to the group chat and can upload legal documents **433** to the entire group. The App enables user selection of alternate group chat **431** modes comprising text, VOIP or video
20 chat. An exemplary wireframe for an enterprise “Group Chat” screen is depicted in **Fig. 10**.

With respect to shared user information and communications in the Document and Chat operations, the Enterprise App informs the user of his/her privacy and confidentiality rights and records the user’s informed consent and NDA agreements **434** in an immutable audit trail **435**.

As shown on **Fig. 11**, the Web App also enables referrals from one enterprise account to another. In this instance, a medical practice is referring a patient to a pharmacy business. In the first screen **501**, a text box **502** is provided for the referring medical enterprise to describe the purpose of the referral. A search bar **503** allows the referring enterprise to search for a pharmacy enterprise to which to refer the patient. The second screen **504** notifies the patient of the proposed referral and elicits the patient's consent **505**. If the patient declines the referral **506**, the referring medical practice can propose another pharmacy referral. If the patient accepts, the pharmacy is notified **507**, and verifies whether or not the patient has received the product or service **508 509**. The process audits and records the patient's consent to the referral as well as their satisfaction with the services provided by the referred business.

Referring to **Figs. 2, 4, and 12**, exemplary embodiments of the User App **210** and the Web App **410** feature a Professional Services submenu **242 436** under the Tool Menu **220** and the Dashboard Main Menu **416**, respectively. Using these tabs, a standard user or enterprise user specifies the professional services **242 436** for which proposals are sought **243 437**. Referring to **Figs. 3 and 13**, the Professional App features a Proposals submenu **335** under the Tools Menu **319**, through which participating professionals respond to requests for proposals **336** with responsive proposals, which are received by the originating User App **244** or Web App **438**, where the proposals can be accepted **245 439**.

Alternatively, participating professionals can use the Professional App **310** to initiate offers for specified professional services at specified fees **337**, which offers **337** are received by standard users **244** with the User App **210** or by enterprise users **438** with the Web App **410**. When such a professional offer **337** is accepted by a user **245 439**, the professional proceeds through the submenus to formalize a professional services agreement **338**.

For example, a standard user who is building a new home could solicit fixed-fee proposals from architects to design the home to certain specifications and could also solicit fixed-fee proposals from attorneys to draft the architectural services contract. The standard user could also accept a published fixed-fee offer by an engineering enterprise user to design and
5 install a septic system for the new home.

In the User App **210** and the Web App **410**, the respective Professional Services submenus **242 436** also include a Proposal Qualification/Evaluation option **246 440**. The Proposal Qualification/Evaluation option **246 440** allows a standard user or an enterprise user to define minimum qualifications for professionals who want to submit fixed-fee proposals for the
10 specified services. For example, a standard user seeking fixed-fee proposals from attorneys to represent the user in a divorce case could stipulate that proposals only be accepted from only certified civil trial attorneys. The App software will then apply the stipulated qualifications to generate a “short list” of qualifying proposals.

The Proposal Qualification/Evaluation option **246 440** also allows a standard user or
15 enterprise user to establish multiple criteria for evaluating professional services proposals. Using such evaluation criteria, the App software will then rank the proposals based on the evaluation criteria. For example, the standard user seeking a divorce trial attorney could define evaluation criteria such as: five or more years of trial experience, at least ten fully litigated cases, and membership in the family law section of the state bar association. The App software will then
20 assign to each proposal a “grade” of 0 through 3 based on compliance with the foregoing criteria.

In some embodiments, the Web App **410** can also include a Studies submenu **450** under the Dashboard Main Menu **416**, as depicted in **Fig. 14**. Under the Studies submenu **450**, an

enterprise user can manage a range of technical, research (including academic and medical), and/or clinical studies, such as testing of a new product or clinical trials of a new pharmaceutical.

Under the Studies submenu **450**, the enterprise user has access to a list of ongoing studies **451**, invites participants to the studies **452**, and manages participants **453** and staff **454** associated with the studies. For example, through the management of participants, the enterprise can track and record compliance with clinical/research guidelines so to reduce the risk of liability arising from non-compliant participants. Exemplary wireframes for study management are depicted in **Figs. 15A-C**.

Exemplary authentication wireframes for study participants and professionals are shown in **Figs. 16A-C**. The authentication process can also include password-protected permissions for access to study data and documents, depending on the role of the participant, staff or professional involved. Such permissions can allow designated staff and/or professionals to review data and draft reports relating to the studies and to edit draft documents, depending on the level of permissions.

In the case of studies subject to regulatory review and standards, such as FDA drug approvals, the software automatically associates the requisite documents and forms with each study category and automatically updates the documents and forms to the latest versions.

As authorized by the supervisor of the enterprise account, the Chat submenu **420** of the Web App **410** can be used for communications between study staff, supervisors, professionals and/or participants. The Chat **420** system can be used to track activities of staff and participants, obtain and document required consents **434** and provide audited risk management **435**.

Optionally, the Studies submenu **450** can be particularly tailored to the requirements of certain enterprise uses, subject to a commensurate fee.

Figs. 17A-17B display an exemplary information architecture for a Studies menu tailored to clinical trials of new pharmaceutical products. Corresponding exemplary wireframes for each information component are depicted in **Figs. 18A-18C**, for Q&A, **Figs. 19A-19C**, for Messaging, **Figs. 20A-20E** for Documents, **Figs. 21A-21B** for Settings, and **Figs. 22A-22E** for Study Management.

Referring to the foregoing figures, a supervisor of the clinical trials can invite a standard user to be a participant in the trials, as shown in **Fig. 22E**, the supervisor and can require a recorded consent from the participant, as shown in **Fig. 20B** and **Fig. 22D**. The supervisor can edit study settings to specify allowed communications between participants, as shown in **Fig. 19A**, and can upload documents to participants, including consent forms and instructions, as shown in **Fig. 20B** and **Fig. 20C**. Under the Study Management functions, the supervisor can track the activities of clinical trial participants and staff, as shown in **Figs. 22A-22C**.

Supervisors, participants and staff can view a list of all clinical trials they are involved in. Supervisors can select, add or replace staff in each of their active clinical trials. The App will provide instructions to executives of the sponsoring pharmaceutical enterprise regarding selection of supervisors, staff and professionals for the clinical trial team, based on their credentials and assignment of roles in the team. Once the team members are selected, their profiles are uploaded to the App and can be viewed by authorized team members. The App gives the team members specific instructions as to how to conduct their respective tasks in the clinical trial. The clinical data is collected by the App and securely stored in the System Database, with access based on team member permissions.

The Studies Management functions can optionally include an expedited preliminary product evaluation procedure for critically assessing and deconstructing a producer's claims as to

the therapeutic efficacy and/or market potential of a new pharmaceutical or medical device product. The preliminary product evaluation procedure generates a plain language assessment of the producer's claims so as to guide investment choices and direct funds to the most promising products, where necessary switching to surrogate products to replace those which cannot
5 withstand rigorous technical scrutiny. The aim is enable informed decision making and avoid reliance on claims which ultimately prove to be specious and lead to litigation.

The present invention assures that the most current versions of professional forms are always in use on its platform. Forms associated with professional services are automatically updated as of the release date of new form versions. This is done either by subscription
10 arrangements with the relevant form-issuing entities, or by release-date downloads from their public websites. For example, a participating medical professional would automatically be supplied with the latest versions of HIPAA forms sent by the System Server **111 (Fig. 1)** to the Professional App **310**, based on subscription services with state medical regulatory agencies.

The system of present invention also assures that its participating professionals are
15 promptly notified of any changes in regulations or standards affecting the services they render to standard and enterprise users. The system software receives notices of all relevant changes in regulations and standards through subscription arrangements with regulatory and standards-setting entities or by notice-date downloads from their public websites. For example, a participating physician who has been consulted by a standard user concerning high blood
20 pressure would receive notices regarding FDA approvals of new blood pressure medications.

Although the foregoing embodiments of the present invention have been disclosed for illustrative purposes, those skilled in the art will appreciate that many additions, modifications

and substitutions are possible, without departing from the scope and spirit of the present invention.