



Product and Workflow Overview

Source-cited evidence, deterministic analysis, and attorney-controlled release in one governed workflow.

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Evidence-to-filing workflow

- Secure intake: register the artifact, matter, source, custody, and digest.
- Quarantine: validate file type, scan, identify duplicates, and block unsafe input.
- Extraction: produce source-located candidate facts; never silently overwrite authoritative values.
- Evidence review: staff admit, correct, reject, or escalate conflicts.
- Deterministic analysis: run versioned formulas and preserve dependency manifests.
- Authority resolution: bind the federal, filer-state, and representing-state packages in effect.
- Attorney release: counsel resolves judgment, approves work product, and controls release.
- Court handoff: transmit only through an approved adapter and reconcile the receipt.

Role-specific experience

- Clients see guided intake, their documents, tasks, status, messages, and their own optional purchases.
- Staff see evidence queues, exceptions, reconciliation, document preparation, and workflow status.
- Attorneys see source support, alternatives, unresolved issues, decisions, signatures, and release controls.
- Firm administrators see users, invitations, role assignments, provider connections, status, and audit evidence.

Governance

Georgia and Florida are currently enabled. Every other state remains unavailable until its effective-dated package is reviewed, tested, approved, and released. Missing authority, unresolved evidence, expired packages, and missing attorney approval fail closed.

Provider integrations

At launch, a firm may connect Microsoft 365 for identity, Outlook email and calendar, Teams meetings, Bookings, and firm-controlled SharePoint/OneDrive document storage. Connections are scoped, revocable, tested with synthetic content, and do not transfer ownership to TSG.

Appointment scheduling

Authenticated clients schedule permitted virtual or in-person appointments through the firm's Shared Bookings page with Outlook and Teams. Chapter Verity records a matter-scoped provider receipt and status, while confidential facts remain in the portal and firm storage.

Product introduction

The current narrated overview is available at chapterverity.com/assets/training/chapter-verity-product-introduction.mp4. Role-specific help inside each portal provides the applicable steps, button guidance, expected inputs, and controlled outcomes.

**Important
boundary**

Chapter Verity provides attorney-controlled workflow and decision-support technology, not legal services. AI and automation have operationalAuthority=false and cannot approve advice, select exemptions, authorize a filing, or create legal effect.

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