



Electronic New Matter Intake

Workflow Software Better Serves the Client and Lowers Cost

by Jim Hammond, president, RainMaker Software, Inc.

Benefits of Electronic Matter Intake

Firms today utilize 1950's technology to set-up new matters. This involves a paper intake form that tends to be re-designed by a committee when there are no better projects to work on. The form makes its way around the office with little regard for any sense of urgency or enforced process. In the end, all the information from the form is re-keyed into multiple firm software products, a source of added cost, further delays and possible miss-entry. Electronic new intake software provides for a single point of data entry, information may be updated into the time and billing system, conflicts, marketing, Outlook, docketing, file folder systems, case management, cost capture devices etc., all from a single point. When the matter is finally approved at the end of the steps, all the data is immediately updated into these systems without re-keying and errors.

Electronic entry also allows the firm to set up a well-defined process or steps in the workflow, mandatory fields of information and approve or decline process. New secretaries and attorneys can easily be trained to follow the process of completing the on-screen forms and clicking "send for approval".

Intake Form Design – Your Way

Today's paper forms are highly unique to each firm and the electronic matter intake program needs to be highly customizable without the use of programmers and out of control expense. Most firms that have electronic workflow today spent large sums of money on multi-vendor products, consulting time and programming only to get basic functionality. Every change to these older systems again required custom programming. New products coming to market provide firms with the ability to easily build their own browser-based web screens by simply dragging functions (objects) or fields onto a set-up screen. No custom programming or expensive consulting is required. Firms will first decide how many steps (screens) are required to complete the matter intake, and then simply design each screen.

Form design objects can include options such as:

- A start-up series of fields that ask for a new client/matter name and description, or even better, choose a prospective client from the marketing system
- An object that allows for quick entry of multiple contacts each with addresses and phone numbers
- The ability to specify attorney designations such as billing, originating and other, along with any necessary splits for credit
- Entry of conflict information and automated searching across multiple databases
- Marketing mail lists additions
- Setting billing rates, bill formats, frequency and task billing codes

Since the designer tool builds the firm's intake sheet in a web browser format, the system can be easily deployed to the entire firm by merely emailing them a link. The

browser-based design makes the need to launch or approve intake forms from a remote office easy to do; the IT staff will embrace it immediately.

Workflow Routing – You Specify the Process

The core of the way new matter intake works is the built-in workflow capabilities. Once the steps (screens) are designed, the firm specifies the routing that takes place when the user clicks “send for approval” or “approval” at the bottom of each screen. For example, when step #1 is completed and sent for approval, who should receive it? The firm can specify an email distribution list, a single person, or the originating attorney. The system will immediately send an email link to that person and log the event into the audit trail screen. The person receiving the email clicks on the link and proceeds to continue the process. The system is smart enough to check for mandatory data entry fields such as zip codes, addresses, phone numbers, etc. which you specify during the set-up process.

The system can be tailored, without programmers, to follow the needs of your firm and work the way you work.

Audit Trails – Total Control

At the end of the day, you need to know that the entire electronic matter intake system is reliable. There is a built-in audit trail that time and date stamps all processes; a permanent record of what transpired. Special alerts can be sent to managers when certain tasks take longer than the firm-defined standards of performance. For example, if you allow two hours to finish data entry on step #1 and it takes longer, managers may get emails alerting them to the delay. The process needs to move along through the firm even if a key person is busy or out of the office.. Having total control provides a level of comfort and assured results.

Conclusion

Electronic matter intake products can provide a way to plan, manage and control the intake process in your firm. It will provide faster response time to the client, lower costs and insure quality and accuracy. The best news is that this technology will come standard in newer front-back office systems.

About the Author

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