

The original All-in-One®
Software Suite for
Case and Financial Management

Front Office Product Sheet

PerfectLaw® Matter Intake Workflow

Product Features

- Accelerates and streamlines communication and collaboration by moving intake forms instantly between support staff, conflicts, approving attorneys, records management and billing, without any paper handling or email
- Real-time alarms or eWork-lists notify users when a form or report needs attention
- Routing sequences can be controlled by the workflow administrator so users must comply with routing and DMS storage policies
- Intake forms are flexible, configurable and can be made practice area specific with PerfectLaw's Screen Painter and Data Browser tools
- Before a form can move to a next stage it is checked by the software to ensure all required and validated fields have been filled in correctly
- Watch-view dynamic monitoring identifies delays and potential bottlenecks before they become a problem; users with appropriate access can see and check the status of any request currently in the intake workflow and how long it has been there; completed intake requests can be analyzed for workflow efficiency

Is your case intake process too slow and cumbersome? Does it require excessive manual steps and administrative oversight? If so, now imagine case intake forms that move instantly from a secretary (local or remote) to conflicts to the approving attorney, etc. without any paper handling or the need for sending or receiving email, fax, or snail mail. Imagine being notified by real-time alarms or pop-up eWork-lists when a form or report needs your attention then, being able to do approvals with a secure eSignature. Finally, imagine that your administrator has complete control over the process because intake forms and conflict reports can't be lost and tracking reports show who has what, where, and how long they've had it. With PerfectLaw® Workflow, this is now a reality.

In fact, PerfectLaw® Workflow streamlines your new business intake, conflict check, and contact management process, and eliminates bottlenecks by incorporating electronic forms with advanced technology. No more stalled intake resulting from delayed approvals or missing critical information or lost time trying to track down and fix paperwork. PerfectLaw® Workflow tracks every move automatically, and pinpoints stalled work to prevent logjams so the process is streamlined and productivity is maximized.

Benefits

- Save time and increase productivity by eliminating manual steps
- Increase productivity and efficiency with streamlined matter intake, instant notification and faster approval cycles with eSignature and automatic routing
- Reduce administrative oversight with secure, electronically enforced, consistent policies and procedures that provide total accountability
- Improved Business Intelligence with advanced tracking, auditing, and reporting methods
- Reduce errors since all steps are performed by authorized persons with proper supporting documentation in the correct workflow order
- Easy to learn since it utilizes the familiar PerfectLaw® interface

PERFECTLAW®
ALL-IN-ONE® SOFTWARE

www.perfectlaw.com
1.800.749.6200

More Product Features

- Simple, secure authorization methods include eSignatures with detailed authorization tracking and approval audits
- Intake workflow is an option with PerfectLaw® All-in-One® configurations; the process is easy to learn, since it uses already familiar toolbars, Navigational Windows, and screen controls
- Intake reports include conflict, intake detail, and new matters opened
- Centralized management ensures appropriate security; workflow services are administered through a simple interface controlling permissions and user preferences

Code	Name	Percent
B.W. BOND	B. W. BOND	50
K.A. DERHAM	K. A. DERHAM	50

Functions

- Intake requests are initiated and processed by attorneys or staff through a series of steps until a new matter is created or the request is rejected for conflict of interest
- After contacts and party data are entered, the request form is submitted to conflicts for checking
- Conflict reviews the form for completeness and either generates a conflict of interest report, or returns it to the requesting user if incomplete; once the report has been run, it is then attached to the form and saved in the DMS; the intake form is then routed to an attorney for conflict review
- If the attorney approves the form, relevant information is then added, including instructions for record managers regarding how to create the physical folders and labels, who to send them to, etc.; the form is then submitted to Billing and Records for finalization
- Once final intake review and approval are done, a new matter is created and new party/contact info are automatically added to the contacts database, and Records Management generates the physical folders requested and, unless exceptions are found during finalization that require additional processing, the form is closed for editing and appropriate notifications are sent to all users
- Add or update routing sequences, workflow states, and security to control who can work on what workflow phases with what work-lists via the DataBrowser, Screen Painter tools and standard PerfectLaw® technology
- Create and maintain queries and reports to ensure accountability and enforce security throughout the review and approval processes
- Save and profile reports in the DMS for quick access and analysis

Conflict Check Report
Search for (james brown) matching all words.
Including Parties,Clients,Matters

Party	Matter
James Brown as Client	Client: James Brown (005); Matter: James Brown v. National Insurance Corp. (005); Opened: 6/20/2001; See: Resp-BWB; Class: Personal Injury
James Brown as DEFENDANT	Client: Ms. Marie Dasher (013); Matter: Ms. Marie Dasher (013); Opened: 6/20/2001; See: Resp-BWB; Class: Personal Injury
James Brown as PLAINTIFF	Client: James Brown (005); Matter: James Brown v. National Insurance Corp. (005); Opened: 6/20/2001; See: Resp-BWB; Class: Personal Injury

Client Code and Name

005	James Brown
-----	-------------

Matters

Client: James Brown (005); Matter: James Brown v. National Insurance Corp. (005); Opened: 6/20/2001; See: Resp-BWB; Class: Personal Injury

PERFECTLAW®
ALL-IN-ONE® SOFTWARE

Corporate Headquarters
PerfectLaw® Software
6100 Blue Lagoon Drive
Suite 350
Miami, Florida 33126

Phone: 800.749.6200
Email: info@perfectlaw.com
Web: www.perfectlaw.com