

## Legal Services of Connecticut chooses Legal Files over other systems for ease of use and quality of support

### Background

The Legal Services Programs in Connecticut are a group of nonprofit organizations that provide legal assistance in civil matters to low-income persons. Services are free. Eligibility depends upon income, family size, assets and legal issue. The legal services system includes the following programs: Statewide Legal Services of Connecticut, Inc.; Connecticut Legal Services; Greater Hartford Legal Aid and New Haven Legal Assistance Association, Inc.

### The Challenge

With more than 200 users, 10 locations, four databases and a single statewide hotline operation that handles all intake, the Connecticut programs needed a robust case management system; one that could ease intake, compute eligibility, transfer files between entities, speed document assembly and possess comprehensive reporting functionality. Additionally, they wanted a single database, but with four views of the database to reduce conflicts. An application that integrated with Outlook would be beneficial, too.

As part of its search for a system that would meet these needs, Connecticut conducted a survey of case management vendors, spoke with other legal services organizations using CMS, viewed demos multiple times, checked references and narrowed the field to a small group of finalists.

### The Result

"We spent over a year looking at case management programs. We wanted something that took legal services needs into consideration and that would give us a robust, but user-friendly product," said Kathy Daniels, IT Administrator for the Connecticut programs, explaining the decision to select Legal Files. Some programs didn't seem to be robust enough; others didn't offer any intake/eligibility functionality.

Legal Files offered both the comprehensive case management functionality and eligibility/intake features, developed with input from national legal services experts, which Connecticut sought. In addition to providing case management and eligibility/intake features, Legal Files also manages matters and supporting activities.

Today the Connecticut programs utilize the Legal Files *Enterprise System*, providing each entity with its own secure views of data, administrative controls and system-wide reporting capabilities, all within a single database. Legal Files provided the organization's IT staff with a single database in one location instead of four separate databases in four different locations.

(more)

*"We have been using Legal Files for years and it has become an invaluable tool for our advocates. I repeatedly hear about the time savings and value of the on-line collaboration that it has made possible."*

Kathy Daniels,  
IT Administrator for the Connecticut programs

### Customer Profile

#### Legal Services Programs in Connecticut

- Four programs serving the entire state of Connecticut
- Responsible for providing free legal services in civil matters to low-income people
- Approximately 200 users in 10 offices and remote locations

#### Challenge:

- Consolidate databases
- Transfer files from central intake
- Select an application that offers both robust case management and intake/eligibility

#### Solution:

- Implement Legal Files *Enterprise*
- Each office learns, uses and supports just one program, sharing whatever information is necessary with other offices and maintaining the autonomy and functionality of each.
- Utilize Crystal Reports/Legal Files to meet reporting requirements

#### Results:

- Leverage on-line collaboration
- Produce time savings
- Improve efficiency and client services

"In Connecticut we have an LSC funded statewide telephone intake office and nine other offices serving the entire state," Daniels said. "That meant that a case management program had to handle everything from a basic legal services intake to a large litigation case. Not only does Legal Files do that, but it also has a good eligibility module and the ability to transfer cases between our offices with just the click of the mouse," she said.

### File Transfer

Legal Files file/case distributor and *Enterprise* features provided the organization's statewide intake system the ability to transfer cases from one office to the next while still maintaining a single database.

Legal Files can transfer a case or a file (along with all related documents, contacts, notes, etc.) from a centralized call center to another office, or between offices. The original case or file is still retained in the originating location for statistical or reporting purposes, and a copy is automatically transferred to the new location.

This functionality is important to the organizations in Connecticut since they have a central intake office. This eliminates the need to re-enter files. Daniels notes that files can be transferred between the program's offices in real time, adding that the software has good security features.

### Eligibility Wizard

Another heavily used Legal Files feature is its Eligibility Wizard. Legal Files provides the ability to manage an unlimited amount of prospective client intake through the use of a two-tiered Eligibility Wizard with the ability to track outcomes to gauge the organization's results. The Eligibility Wizard captures the potential client's problem, household information, income, factors, assets, demographics, benefits and funding information. The Eligibility Wizard also provides the poverty percentage indication on the potential client and, if necessary, opens the client file.

### Document Assembly

Fully integrated with Microsoft Word, Legal Files enables users to create and edit all types of documents in their word processor without ever having to leave the program, plus offers all the features of Word for creating and formatting document templates. With Legal Files Document Assembly, a user can create a single template for any type of document, and then automatically merge documents based on that template using previously entered data.

### Outlook Integration

The Legal Files Outlook Integration makes it easy to save e-mail, appointments, tasks, and contacts to your Legal Files database. A "Save to Legal Files" button can be selected whenever an Outlook record (e-mail, appointment, etc.) needs to be saved in a Legal Files case.

This industry-leading integration provides the option for users to continue to use their familiar Outlook application, while ensuring matter related appointments, tasks and e-mail are saved in the appropriate case.

### Crystal Reports

Since Legal Files integrates with Crystal Reports (and other third-party reporting tools), the Connecticut programs use it to create beyond the 90+ standard reports already included in Legal Files. The integration maintains the structure of the Legal Files security system and allows users to generate custom-built reports from within Legal Files.

### Quality Support

The company behind the software also played a key role in choosing Legal Files, Daniels said. "Features and user-friendliness aside, one of the key factors in our decision was that other users gave Legal Files excellent references, especially for their customer service," she said.

"When we purchased the program, one of our key considerations was the quality of the support," Daniels said. "Legal Files was highly regarded by others for their support then, and our own experiences with their staff and support have always been very good."

### Bottom Line

Would you recommend Legal Files to others?

"Definitely," Daniels said.



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