

Illinois Education Association chooses Legal Files for its matter/document/email management tools

Background

The Illinois Education Association is an association of more than 130,000 members composed of Illinois elementary and secondary teachers, higher education faculty and staff, educational support professionals, retired educators and college students preparing to become teachers.

The IEA Legal Department has three offices throughout the state. The IEA general counsel is responsible for coordinating the IEA-NEA Unified Legal Services Program which provides assistance to IEA members with employment related legal problems, and to IEA local associations having legal disputes with their school boards.

The Challenge

Each office has attorneys who represent the members and locals of the Association, with the headquarters being the central location. Responsibilities for legal cases are shared by three separate offices. "We have multiple offices which can make collaboration or sharing files difficult," explained IEA Administrative Assistant Ann Holmes. "Prior to Legal Files, we had a system in place that could track basic case information, but could not store documents, phone logs or email." Consequently, each person was storing documents on his/her local computer and in their own files. There was no consistency on how documents were named, tracked or filed. Everyone had her own way of managing matters.

"We were struggling to find ways to enhance our processes and make our jobs more efficient," Ann recalled. For example, it was time-consuming just trying to share a document with a colleague. You could copy and mail the document, or there was a lot of scanning and emailing. "It was overwhelming for everybody. We needed a tool that could better track all of our matters, including documents, phone logs, voicemails and email," she said.

After a department meeting, "I said to myself, there's got to be a different way and did some Googling," Ann said. A small group within the department was formed that included attorneys, associate staff, administrative staff and a representative from the association's information technology department. "We looked at three or four options," she said, "but nothing compared to Legal Files."

The Results

Since becoming a Legal Files customer in the Fall of 2012, the department is
(more)

"Nothing compared to Legal Files."

Ann Holmes, Legal Services Department
Illinois Education Association

Customer Profile

Illinois Education Association

- The mission of the Illinois Education Association is to effect excellence and equity in public education and to be THE advocacy organization for all public education employees.
- Offices in Springfield, Edwardsville and Chicago
- 20+ users

Challenge:

- Offices in different locations made collaboration and file management difficult
- Existing system couldn't manage documents or email

Solution:

- Implement one system to make organization-wide collaboration easier and less time consuming
- Implement a comprehensive system that could handle all aspects of matter management, including documents and email

Results:

- Operate more efficiently and as one team
- Focus is on core mission; providing legal services to members and not administrative items

(cont'd from front...)

able to more efficiently focus on its mission. "Yes, Legal Files is a great way to share our files," Holmes said, "and it helps keep us organized, but it does more than that. A primary part of the IEA's mission is to be THE advocacy organization for all public education employees. Legal Files helps us be the best advocate for our members. It allows our attorneys to deal with member issues—not the administrative stuff. It saves time, so they can do the work they need to do."

Ann said that the legal department continues to discover and explore new ways Legal Files can enhance its operations. "We've just touched upon its potential," she said, explaining that Routing and Document Generation are just two of her favorite tools right now.

Routing

Document Routing, part of Legal Files' built-in Document Management System, allows team members to electronically route documents to a single user or to multiple users at the same time with a note attached. With Legal Files, documents are stored and cataloged in the file they reference, and thus easy to search, retrieve—and route. Prior to implementing Legal Files at IEA, someone needed to copy and mail or scan every page of a document and then email accordingly. "Now we just route it, which is awesome. This saves postage and can get to others immediately," Ann said. "Not only can you route a document, but you can see when it was routed and who has read it."

Document Generation

Another key Legal Files feature for IEA is the application's document generation functionality. Legal Files includes a built-in document generation or document assembly component that can be used to automate the generation of standard forms, letters, contracts and other matter related documents. With Legal Files Document Assembly, a user can create a single template for any type of document, and then, from within the matter or the file, automatically merge documents based on that template using data from the file.

"No one has to store or maintain their own set of Word templates anymore," Ann said. "And if the data is in the file, it takes Legal Files just seconds to generate a document."

Support

None of these technical tools would be much use without the initial onsite training the association received and ongoing support it continues to receive from Legal Files Software, Inc. Whether it involves an upgrade or an issue, Legal Files Support "understands what I'm saying," said Ann, who also serves as a Legal Files administrator for her department. "They are quick to get back to me if they need to, and it's always been a real positive experience."

Bottom Line

When asked what she would tell someone who's thinking about a matter management system, Ann said, "Go buy Legal Files. We love it."



Managing what matters to you.

(800) 500-0537
www.LegalFiles.com