

New Hampshire Board of Tax and Land Appeals chooses Legal Files for flexible, easy-to-use matter management

Background

The goals of the Board of Tax and Land Appeals are to provide an alternative forum to the superior court in tax cases that is timely, fair, inexpensive and accessible to the taxpayers and property owners. The Board has responsibility, parallel to the superior court, to hear appeals of all local and state taxes.

With respect to tax matters, the Board has responsibility for:

- hearing appeals of individual tax assessments, exemptions or refunds, whether levied by the state or its municipalities;
- hearing petitions for reassessment and determining the adequacy of reassessments ordered by the board; and
- hearing any appeals of the equalized valuation determined by the Commissioner of Revenue Administration.

In eminent domain cases, the Board receives declarations of taking and deposits of damages and holds hearings on the question of just compensation. After the board holds a hearing and issues a decision, if either party disagrees with the Board's award, that party may appeal to the superior court for a trial de novo.

The Challenge

The Board had a DOS based legal case management system that operated in a Btrieve database environment. The system had been developed in the early 1990s and support had been severely curtailed, according to Board Chair Michele LeBrun. The state circulated a Request for Procurement and the Board first became aware of Legal Files in 2002 after the software company responded to the RFP. Legal Files was installed and implemented in March 2003.

The Results

The Board now has eight Legal Files users, including support staff and three board members. Being a quasi-judicial entity, the Board primarily uses Legal Files to maintain case specific information, schedule hearings and gather statistics according to Anne Stelmach, Clerk. The document generation feature is used extensively, as well as the internal reports.

“Legal Files allows us to be more informed about the status of cases, and have a better understanding about the number of cases and their progression,” Stelmach said. “Legal Files allows us to efficiently manage document production. The calendar feature allows us to identify scheduling conflicts.”

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Michele LeBrun, Chair
Board of Tax & Land Appeals

Customer Profile

New Hampshire Board of Tax and Land Appeals

- Government agency
- Responsible for hearing petitions and appeals regarding tax matters
- Eight users

Challenge:

- Replace outdated DOS system
- Convert existing data to more flexible system
- Improve reporting capabilities

Solution:

- Implement Legal Files Software to schedule hearings and maintain case information
- Customize program to store data and assign workflow for various case types
- Design document templates for faster document production and quicker response to public inquiries

Results:

- Better efficiency
- Easily modify data and workflow to suit evolving requirements
- Provide greater service to constituents; promote open-government concept

Maximum Efficiency

Without Legal Files, it would be impossible for such a small number of team members to process the Board's caseload. "We have three staff members who process appeals," Stelmach explained. "On average, we have 600-700 appeals each year. Without Legal Files, and specifically its document generation functionality, we would need much more manpower. Without Legal Files, we could not operate our office efficiently."

Innovative Usage

The Board's Legal Files calendar is also used in a very innovative way to improve constituent service. "Our Legal Files calendar integrates with our website (www.nh.gov/btla)," Stelmach said. "Our hearings are open to the public, so once we schedule a hearing in Legal Files, it automatically populates our website calendar. Hearing information is immediately available to the public on the website. Not only is this enhancement very popular among people who track our cases, but promotes our open-government concept."

Program Flexibility

"My favorite thing about Legal Files is the product strategy," LeBrun said. "There is sufficient flexibility to customize the product to meet our needs." Legal Files' flexibility allows the program to grow and change as the users' requirements change. Legal Files customization is accomplished from within the program itself. No programming ability is required or needed. Any non-technical person, with the proper security and training, can perform Legal Files customization.

Because Legal Files is designed to allow non-technical users to administer and customize critical aspects of the application, the user can easily create custom windows, menus, document templates, etc.

"The best thing about customization," LeBrun said, "is that we do it ourselves! The flexibility of the program makes it appropriate for anyone with case scheduling and quasi-judicial functions."

Dedicated Personnel

Looking past the technical aspects of the software, LeBrun is also pleased with the people behind the software, the Legal Files team who back up the product. "The personnel dedicated to support and training are first-rate and very responsive," she said.

The company's commitment to customer satisfaction is what truly sets Legal Files apart. Legal Files software is backed by a team of dedicated professionals, all industry leaders in their areas of expertise. In addition, each and every Legal Files employee is a daily user of the Legal Files case management system. Key members of the Legal Files development team have worked with the product since its inception.

Bottom Line

"I would encourage any government agency that has case management needs to carefully consider purchasing a system like Legal Files," LeBrun said.



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