



10 tips for streamlining

Case Management Software

Legal Workspace's applications specialist explains how to make your practice and case management software work harder.



10 Tips for Streamlining Case Management Software

Practice and Case Management applications empower attorneys to streamline their law firms. Case Management software is a powerful tool that centralizes firm client information, including contacts, cases, calendars, documents, and other essential client case information. Over time, the databases need to be cleaned-up to preserve data integrity and accuracy. Here are 10 tips to keep your practice management database trim, relevant, and running at optimal speed.

1. Inactivate or delete outdated codes/categories

Most Case Management systems have a coding system in place to organize and search data. The coding optimizes the organization of the data, lists, and reports within the database. When a Case Management software installs typically codes are included by default. Some of these codes may work for your firm's environment and other may not apply. Additionally, codes are added to the database to meet the firm's business requirements. However, over time the codes may become redundant, irrelevant, and cluttered. It is important to remove unused codes and make outdated codes hidden or simply delete.

2. Remove duplicate contacts

Case Management applications include a firm shared contact List. Because it is a shared database, there will inevitably be duplicate contact records. Most Case Management systems contain a built-in duplicate contact utility to combine or delete duplicate contacts. In some systems, the Contact records will be compared to the other Contact records based upon the search criteria selected in the utility. The utility will combine your duplicate Contact Records and transfer all related records with this Utility. In my database administrator handbook that equals awesome!

3. Handle terminated staff properly

This seems to be a common thorn in every firm's side. Leaving the former staff in the system clutters the staff list. If the staff member was part of a group or team, the information will need to be updated. Are there any work flows that include the terminated Staff? Terminated Staff should either be deleted or made Inactive.



4. Archive records

It is important to keep the active lists trim with active data. Leaving closed Matters and Clients in the Active list is creating unnecessary clutter. Use an Archive utility to move the closed Matters and their related records to an Archived or Inactive list. This practice will keep the active lists current and easier to navigate.

5. Use the recycle bin

Delete outdated and incomplete data records from the various lists. Data entry errors will occur and need to be deleted. In many Case Management systems, Records may be deleted individually or in batch. Remember to empty the Recycle Bin periodically.

6. Update or delete old document generation templates

Outdated document generation templates in the firm's Case Management software can cause serious problems. It would be very problematic for a staff member to accidentally use an outdated template. Keep the list trim and current with the firm's needs.

7. Remove unused and outdated shortcuts and favorite shortcuts

Many times I will find multiple shortcuts to data and lists being used. Most of them work and others do not. Non-working or outdated shortcuts creates a distraction and frustration for all staff members. Some of the shortcuts may be outdated because the business workflow has changed, or a practice area is no longer part of the firm's practice. Shortcuts are a powerful and easy method to access the firm's data. But if they are outdated or no longer work, they need to be deleted.

8. Delete outdated work flow templates

Many of the Case Management applications contain customizable work flow templates for calendaring. It is imperative to update the templates as court rules change. If the template is out of date, these can cause serious problems with calendaring rules. Alternatively delete the template if it will no longer be used.



9. Clean-up the Case Management internal instant messaging

If the firm is using the Case Management internal instant messaging, the rule should be “Read and Delete.” There’s always one or more staff members who are using the instant messaging as their pseudo ToDo List. If this is an issue for your firm, contact a partner to design a strategy for clean-up.

9. Run maintenance

It is important to remember that case management applications are a database that needs maintenance, similarly like your vehicle needs maintenance. Maintenance should be run on a routine basis based upon the firm’s use of the software. At the very least, Maintenance should be run quarterly and more often based upon the usage. Consult with your certified partner regarding a recommended maintenance routine.

Legal Workspace is a pioneer in cloud-based work environments and data storage designed specifically for law firms. Learn more at legal-workspace.com.