
Legal Hotline Quarterly

Issue No. 7

A Publication of the Legal Hotline Technical Assistance Project
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Software Review Issue

Review of Latest Legal Hotline Software*

The first issue of the Legal Hotline Quarterly, Winter 1996, featured a review of the software in use by the senior legal hotlines at that time. Not one of the eleven programs participating in that survey had Windows-based hotline software. While many existing programs continue to operate efficiently with their old software, hotlines looking for new software will find the 1996 software survey as obsolete as the 386 it was published on.

In this issue, the Technical Assistance Project reviews four new software products for legal hotlines/telephone delivery programs:

(In alphabetical order):

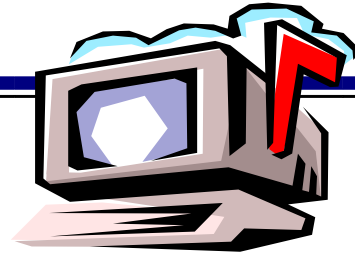
- **Clients for Windows Version 98**, from Kemp's Case Works;
- **ProLaw**, adapted for legal services by the Legal Services Association of Michigan Computer Committee.;
- **TIME**, from Western New York Law Center;
- **WinCases** from Wamsutta and Professional Business Solutions.

**The Project does not recommend any particular product but provides this data in keeping with its mission to inform legal hotline about available products, services and resources.*

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The four systems span a range of simple to complex. The suitability of the hotline software depends on the operational needs of the individual legal hotline; any one of the programs may fit a particular hotline's needs better than another.

Methodology

Each of the software providers completed a detailed Survey describing the features of their software. The survey was designed to gather information about nine components of the system:

(1) Specifications, Costs and Systems Administration:

This segment surveyed the types of hardware needed to run the software, costs and efficiency of installation and use, training, and technical support.

(2) Client Information Function

This part of the survey sought descriptive information on the efficiency of entering basic client demographic information, searching for existing clients, viewing old cases, adding cases, etc.

(3) Conflicts Checking

(4) Tickler and Scheduling Functions

(5) Casenotes and Services

Providers and users were asked to describe the efficiency of viewing, creating or adding casenotes to a case; the ease with which casetypes could be changed or added; and whether the software could code materials to be mailed out on a specific case .

(6) WordProcessing Features

(7) Reporting/Printing Functions

This section surveyed the types of reports that the software can generate and its flexibility for in-house modifications.

(8) Conversion of Existing Data

Data from the provider surveys is summarized in Software Features Table on page 27. A sampling of software users filled out questionnaires about their

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satisfaction with the various features of the software. Those results are summarized in the User

AARP Legal Services Network (LSN) Announcement

AARP LSN is looking for attorneys to adapt and update LSN legal materials. Subjects cover a wide range of topics, including health care, estates, and consumer issues.

The attorney will be responsible for reviewing all submitted materials and making any revisions required so that all materials conform to current state and federal law. The attorney will be responsible to do whatever legal research of case law, statutes, and regulations is necessary to accurately describe the state of the law in the attorney's jurisdiction.

The legal materials to be reviewed include the following: *Frequently Asked Questions for Attorneys and Clients* (approximately 90 questions); *Legal Checkup Workbook*; and *Client Self-Help Guides* (approximately 14).

Compensation for updating and adapting the materials from already existing formats will be \$2,000.

Attorneys licensed in the following states are needed:

**AZ, AR, DE,
HI, IN, KY, MA,
MD, MN, NJ,
RI, VA, VT, WV, and
WASHINGTON, D.C.**

If interested, please contact Mary Jo Potter, Esq.

mary.jo.potter@aarp.noli.com or (336) 998-0168





***Clients 98
For Windows***

Supplier:

**John Paul Kemp
Kemp's Case
Works**

**2304 Sherbrooke
Dr.
Atlanta, GA 14203**

**Phone: 404-320-
7126
Fax : 404-636-7767**

ProLaw

Supplier:

**ProLaw
Software
P.O Box 20628
Albuquerque, NM
87154**

**800-977-6529
www.ProLaw.com
*In Conjunction
With:***

**Michigan State Bar
Rick Winder
306 Townsend
Lansing, MI
48933
800-968-6723
Fax
517-371-3325
www.msbf.org**

TIME

Supplier:

**Western New York
Law Center**

**295 Main St.
Buffalo, NY
14203**

**Phone: 716-855-0203
Fax: 716-855-0203
www.wnylc.com**

WinCases

Supplier:

**Wamsutta and
Professional
Business
Solutions**

**Mike Holmes
2303 Hillmeade Dr.
Nashville, TN
37221**

**(615) 356-3810
Fax: (615) 356-
4058**

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Satisfaction Survey on pages 33-35.

Project Staff also reviewed written material provided by the software suppliers, studied the demo disks for Clients for Windows 98 and TIME, and viewed software demonstrations at conferences for Clients, TIME and ProLaw.

The following articles and tables incorporate information gathered by Pat Thornton, at Legal Counsel for the Elderly in Washington, D.C., who compiled the survey instrument based on questions submitted by computer systems staff as well as legal services program managers. She also conducted in-depth interviews with the software suppliers and users.



REVIEW OF KEMP'S CLIENTS FOR WINDOWS VERSION 98

FROM KEMP'S MATERIALS:

Clients for Windows is a computerized case management system designed to track clients, *pro bono* lawyers, staff work and other tasks. The company works primarily with legal services and *pro bono* programs, law schools and IOLTA offices. Its owner, John Paul Kemp, was formerly a legal services managing attorney. **Clients** is being used in over 150 programs in 44 states.

Cost:

Version 98 cost \$2900.00 per office. There are further charges if additional offices need the system. The SQL option is \$1200; the Intake System option is also \$1200.

Training and Technical Support

The cost of training is not included in the purchase price. The training for staff usually takes 1/2 day per office; however some offices do not choose to receive any training.

Technical support is accomplished via the phone. Most phone calls are not billed. Kemp's does not provide a maintenance agreement. Technical support can be obtained through a local consultant, remote access, e-mail, and soon, via a website.

Features

The software is designed to track case information, time-keeping, trust accounts, agency referrals, conflicts, staff members, and private bar involvement lawyers. It has an office calendar and tickler system. It also calculates client financial eligibility for legal services, and generates form letters as well as a large variety of reports.

Version 98 has been extensively rewritten to take advantage of the improvements in *Access 97*. It provides much faster processing, allows publishing to the Web and access to the Web from within **Clients**. **Version 98** is shipped on CD-ROM rather than disks, and upgrading from earlier

versions of **Clients** is easier.

In response to survey questions, summarized on the charts pages 28, Mr. John Paul Kemp reported the following features of his software:

Specifications:

The earlier versions run on Windows 3.1 or 3.11; the newer version runs on Windows 95, Windows NT and Windows NT workstation. It is written in Access 97, Visual Basic for applications, and has an Access database. The hardware must be at least 486-33mhz-16mb. If Windows 95 is used, Pentium is required to run the software.

Clients Version 98 can generate e-mail, network with other computers, and provide remote as well as internet access. It also interfaces with a separate report generator. An unlimited number of people may be on the system simultaneously.

The software does not have a backup system embedded in the program. Whatever server backup is being performed-whether tape, optical, or disk, will work to back-up the program.

Many programs modify the software to suit their needs. This is possible because the system is not locked, and the source codes enabling in-house changes to be made are included for the purchaser.

Client Information

The initial client input takes about 2-5 minutes, depending upon the options used. The initial input is performed on multiple screens but they are linked together by tabs or buttons. It takes one page to input eligibility information and 3 screens to gather the complete demographic information.

The system provides a list of all cases for a particular client, along with the case numbers, address, date opened and case type. Summary information can be easily changed.

Input can be done without moving to different systems for such functions as services, appointments or payments, by using tabs or buttons on the screen.

If a case is created erroneously it may be purged before saving, by hitting the escape key. Likewise, information is protected from being lost by mistake by the AutoSave feature.

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The system searches for clients by name, telephone number, conflict data, and other criteria. Duplicate intakes may be made if an existing client has a new case.

Cases are automatically numbered. Client information fields include contact persons, income, ethnicity, county, citizenship, referral method, social security number, age, and numerous others.

Various user defined fields allow in-house staff to change or add fields in the database.

Conflicts Checking

The client search automatically shows duplicate clients. There are four different levels of performing conflicts checks: server, network, number of conflict records, and number of users. The conflicts check is fast but the speed depends on various factors, such as the operating system, server, network, and number of users.

Tickler and Scheduling

Clients 98 has a tickler system which allows the user to print selected tickler items as well as add or delete tickler items. The tickled items are not automatically erased when a case is closed.

The software contains a group calendar as well as a personal To Do list.

Casenotes and Services

There is no limit on the amount of casenotes which can be entered. Casenotes can be easily accessed and added to; they are automatically date-stamped and identify the attorney who input them.

The program will not automatically assign a time to each activity but can be easily programmed to do so. Look-up tables are available for most fields. Casetypes and service codes can be easily added or changed. The user can enter codes for materials to be mailed out and the program can generate mailing labels.

Referrals and Accounting

The program is able to track referrals to agencies, *pro bono* attorneys, and fee-panel attorneys. The software automatically matches the client to an appropriate agency or attorney with respect to location, casetype, and when a particular

attorney last took a case from the program.

The software can track billings for the referral panel, print appointment and billing reports and generate mailing labels for the referral attorneys.

Word-processing/ Reporting Functions

Clients accesses a Windows-based word-processing program which can easily create client letters. The word processor can also be used to prepare other documents.

The program can generate a masterprint of all cases worked on in a given day, pending and new. The program can print single or multiple client information forms. It can generate reports for demographic statistics, fee-panels, referrals, number of clients, number of cases, number of services, service-types, calls-per-hour, cases-per-hour, cases-per-county, referral methods, and activity reports. The program may be able to generate a units-of- service reports depending on how they are tracked. The program can produce sub-routine reports and filters are available for all reports.

The in-house staff should be able to tailor reports as needed. Generally, if the information is gathered, a report can be generated for it, either with preprogrammed reports or with Access.

Conversion of Databases

Old data from DOS programs can be converted to Clients, as can data from PICK systems, so long as it is exported to any other program. The costs of conversion are \$95.00 per hour. The conversion usually takes one 8 hour day.

Mr. Kemp reports converting over 3 million client records from every imaginable system. The primary problem he finds in the conversion process is the quality of the data to be input.



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Clients Version '98 SQL Option

At the additional cost of \$1200, users can purchase the SQL (Structured Query Language) option. The SQL back-end tables option is for those offices

that desire a WAN and/or a more robust database engine. With SQL the processing is done on the server and the results transferred to the users.

Intake System Option

This option is also available for an additional \$1200. It is designed to guide volunteers, paralegals, law students and inexperienced attorneys through a series of questions linked to the special problem code related to the client's problem. The question pool is controlled by each legal services program. The goal of the Clients for Window Intake System is to increase the quality and quantity of legal work by getting the staff to enter essential facts on the first try.

From Legal Hotline Project Staff

Clients for Windows opening page displays a binder with rainbow-hued tabs. (See page 8). The tabs paint a good picture of the features available in the software such as Forms, Searches, Conflicts, Agencies, etc. The demo CD-ROM shows off the striking colors of the program and gives a good snap shot of each of the screens such as the client eligibility screen, casenotes entry area, conflicts-checking screens, form letters, referral agencies, etc. The demo CD however, can only be viewed but not manipulated in any way.

Kemp's Case Works provides useful promotional documentation for Clients Version 98. This 11 page document explains the upgraded features in detail. It describes the log-in procedure; the main menu features; detailed information about the searching options; descriptions of the intake sheets; reporting options; changes to tables and fields, and much more. Anyone interested in the software should request a copy of the document from Kemp's.

The program has a lot of great features which are enumerated in the *Software Features Table*. Particularly, the program has the ability to conduct a search on multiple levels. It can search for problem types in a particular county to effectuate a proper

referral. It has an import feature which should allow 6 data to be transferred quickly to other offices. For those programs working with volunteers, or attorneys at other sites, the ability to enter the system and work on cases remotely, is a crucial feature.

What the Users Say:

Kemp's Clients, in its various Windows versions, is in use at over 155 programs in 44 states. For this review, four users filled out a detailed questionnaire about their satisfaction with Clients for Windows: the Legal Advice and Referral Center (LARC) in Concord New Hampshire; Gulf Coast Legal Foundation in Texas; Legal Services of Eastern Oklahoma (LSEO) and the Georgia Senior Legal Hotline. (GSLH). LARC runs Windows '95 with 15 users. Gulf Coast runs Windows 3.1 with 37 users and LSEO runs Windows '95 with 50+ users. All three had Clients installed in 1997. GSLH uses the 98 version. It has 6 users with a Windows NT server and Windows 95 workstations. Additionally, the Project obtained general satisfaction ratings about this software from 11 other programs. The average satisfaction rating for this software, on a scale of 1 (low) to 5 (high) for these 14 programs is "4". The sole program reporting on the 98 version, which offers numerous improvements over the older versions, gave Version 98 a "4-5" overall satisfaction rating.

The averages of satisfaction results for all surveyed uses are summarized in the *User Satisfaction Table, pages 33-35*.

The users' observations about the software are described below. Their ratings are recorded on the Table on page 9. (*Clients Users Satisfaction Table*).

Clients' Users Comments System Administration

LARC's staff member states that "Mr. Kemp has provided some administration tools, however, system administrators need to have 'at least' moderate proficiency in Access version 2 to adequately administer the database." According to Gulf Coast "the system is very easy to administer. A basic knowledge of Window Operating System will allow you to do almost all of the routine administration tasks." LSEO reports that the system "has some lockups that require everyone to shutdown the program and then repair data."

The Gulf Coast staff member finds that

“information input is very easy, however changing information can be difficult. This is not necessarily a bad thing, since it prevents the normal user from arbitrarily making changes.” At GSLH, they occasionally encounter a bug that ties them up a bit. They usually are able to fix the problem by closing the program and re-starting it.

Training and Installation

LARC personnel received four hours of training with the cost of the software. Its survey notes “that the staff could have benefited from between one and two days training.”

Gulf Coast and LSEO paid separately for three days of training. Gulf Coast estimates that proficiency in using the software could be acquired in one day. LSEO program estimates that two days of training are needed for users.

LARC comments that “the cost of installation might be considered excessive when one considers we paid for Mr. Kemp’s travel, lodging and expenses. Training was adequate, and support minimal.”

Gulf Coast found “the cost was quite reasonable and the on-site visits for training were very useful.”

GSLH paid \$950 for one day of training which was sufficient. They have not needed much technical support as yet. The Manager reports that “we learned more from playing around with it and from the supporting information provided.”

Conflicts/Tickler

LARC found the conflicts check to be “nicely designed”. Gulf Coast commented that the conflicts check “is very easy to use”.

The LARC program uses the MicroSoft scheduler exclusively and “found the tickler system somewhat cumbersome”. It did not give this function a numeric rating. At GSLH the conflicts check does not easily integrate with the rest of the legal aid program. The Georgia program also finds it hard to see the detail about the reason for the tickler or calendar item from the first screen.

Casenotes

The Gulf Coast reporter finds “the casenote function is the easiest and most enjoyable part of the system. Everyone intuitively understands how to record casenotes.”

Referrals

LARC notes that “the referral function works well”. They do not use the accounting function. Gulf Coast finds this section of the software to be “a good resource but best used by an experienced user”. The Georgia Senior Legal Hotline, a brand new user of the 98 version of Clients, reported to Project Staff that the referral resource matching feature of this software was particularly useful.

Wordprocessing/Reports

Reporting on an older version of the software, LARC states: “The software provides only a simple text editing program. However, it does provide some versatility with respect to document generation”.

GSLH finds “the form letters summarizing advice are great! They are easy to generate and modify”. That program is still learning how to print reports so they did not comment on that function except to state it “is not so easy”. According to LARC staff, “the software came with some canned reports which required alteration and customization with Access Version 2.”

Data Conversion

Three programs converted data from other systems. The conversion time ranged from 12 hours to three days. LARC converted from the NYLS old intake system. Gulf Coast converted from Clients for DOS and LSEO converted from something called Btrieve. The Georgia Senior Legal Hotline began operations with Clients and didn’t have to convert data.

LARC encountered no problems with converting its old data. At Gulf Coast, the biggest problem was dealing with information on older cases where the advocate was no longer with the program. LSEO had to identify required fields, and change codes to match new fields. LARC stated “No problems noted in the conversion. Mr. Kemp did an excellent job.”

User Recommendations

LARC, whose overall rating for Clients is “3” states “The software has some nice features;” Gulf Coast, overall rating “4”, states: “I would recommend Clients for Windows as a good solution for legal services programs.”

KEMP'S USER SATISFACTION TABLE

LARC

Gulf

LSEO

GSLH

Was it easy to install and set up?

3

4

4

4

Is it easy to add users?

4

5

5

5

REVIEW OF PROLAW FROM MICHIGAN STATE BAR FOUNDATION

PROLAW is being implemented at Michigan legal services organizations as a pilot project. The software is currently being tested by four Michigan legal services organizations. An established private law office software program, it is being converted for use by legal services programs. It is presently in the middle of development. An evaluation and report on the pilot will be available later this summer and can be read at www.msbf.org. (Select the "Technology" button).

The Legal Services Association of Michigan Computer Committee reviewed several software packages for case management and time keeping in that state's legal services programs. On February 11, 1997, the Committee voted to recommend that Legal Services in Michigan use ProLaw version 7.0 to standardize their software statewide. The system requires Windows 95 and at least 32mb of RAM. Since not all the Michigan programs have this capability, the Computer Committee recommended asking the Michigan Bar Foundation to fund the upgrading of equipment and installation of this software.

The Committee's report indicated it chose ProLaw because it includes a large variety of features such as case management, calendaring, and document generation. Additionally, ProLaw integrates with the existing Michigan legal service programs' statewide GroupWise e-mail system so that updates to remote sites can keep case information and client conflict data current in all offices.

The Committee also notes that ProLaw has been in existence for 10 years and has 45 employees, in contrast to the newer/smaller operations of the other software providers. Also, ProLaw has been very willing to work with legal services in Michigan and has provided a large discount on the software for consolidated purchase and training.

Information about ProLaw and a full working single-user evaluation version can be obtained from the ProLaw website at www.prolaw.com. In addition, Richard Winder, Deputy Director of the Michigan State Bar Foundation and a member of the LSAM Computer Committee, is willing to answer questions about ProLaw implementation.

Cost:

The current pilot project cost is \$380 per user, with an option to expand statewide at \$280 per user. ProLaw is licensed on a per-user basis.

Training and Technical Support

The cost of training is additional to the cost of purchasing the licenses for each user. Moderate training is needed for basic users, but extensive training is needed for the Systems Administrator. Training fees at the Albuquerque offices of ProLaw are \$800 per day.

Technical Support must also be purchased separately. The price of the support contract from ProLaw depends on the number of professionals in the organization, ranging for \$695 per year (1997) for 5 people to \$8,995 for 300. ProLaw uses PC Anywhere remote access software to trouble shoot problems. Upgrades to the software are posted on the website for downloading and are included in the support agreement.

Features

PROLAW features include: accounts payable; cost recovery; case management; contact management; conflicts; document control; records management; report writer; docketing; GroupWise integration; time-keeping and billing, as well as server SQL.

In addition to providing uniform case management and time-keeping, ProLaw functions as an automated intake system. ProLaw's eventual ability to transfer client and case information among legal services offices, *pro bono* and other referral attorneys with the software, is an important feature. With an inexpensive scanner, it will also be possible to attach images to a file, such as a client's photograph,

Specifications:

PROLAW runs on Windows 95 or Windows NT. It is written in Delphi and uses a Sybase database. In order to run the program, a minimum Pentium 100 with 32 mb of RAM is required along with an NT server.

ProLaw can support e-mail, network, and remote access functions. Internet access is possible but complex. It also has a separate report generator. There is no limit to the number of people that can use

(Continued on page 11)

the program simultaneously.

There is a back-up system embedded in the program. Back-up can be accomplished either by running the SQL back-up or the normal server back-up.

Source codes are not needed for in-house staff to make modifications to reports or other features.

Client Information

Entering initial client information takes about 2-5 minutes. Eligibility and case information input take an additional 2-5 minutes. In order to complete the initial intake, the user needs to tab through 5-9 screens.

The software displays a list of all cases for a client along with the case numbers, date opened, and casetypes. Summary information can be changed easily.

Input can be done sequentially without moving to separate systems for services, payments or appointments. However, they are all on different screens in the ProLaw system.

Cases opened by mistake can be purged immediately. The system can be set to prevent change or deletion after a period of time specified, such as ten minutes.

The system performs a database search for client name, telephone number and conflict data, and new cases are automatically numbered. The software has fields for contact persons, income level, ethnicity, county, U.S. citizenship, referral method, social security numbers, ages and many others. In-house staff can change or add fields to the database.

Conflicts Checking

To perform a conflicts check the user enters the client's name and opposing parties names' or parts of the names; ProLaw lists all clients with matching entries. The search can be modified by adding additional letters if the list is too long. It takes about 5 seconds to run the check, but as many as 30 seconds if there are multiple names to be compared.

Tickler and Scheduler

PROLAW's tickler allows the user to selectively print tickler items and add or delete tickler items. The tickles are not erased when a case is closed. The scheduler can docket items and integrate with the

GroupWise or Outlook scheduler.

Casenotes and Services

The software permits entry of 16 pages of casenotes but unlimited additional notes can be added as "event docket" items. The general notes are not date stamped but the event docket items are. The general notes are not automatically identified with the attorney inputting them, but the event docket item notes are.

The program can assign a time to each activity. Look-up tables are available for those fields where they are needed. Case types and service codes can be added or changed and the user can enter codes for materials to be mailed out. The program has built-in reports for generating mailing labels.

Referral and Accounting

The program tracks referrals to agencies, *pro bono* attorneys and fee-panel attorneys. The software produces a list of referral sources which match the called-for casetype and location. The software has a full accounting package including time and billing reports and mailing labels.

WordProcessing/Reporting Functions

ProLaw accesses WordPerfect or Word. It can generate client letters and other documents.

The program can print a list of cases opened or closed on a given day. It can generate reports for multiple sites and print client information forms. The program can generate reports from demographic data, fee-panels, referrals, units-of-services, number of clients, number of cases, number of services, cases - per-county, referral methods, and activity reports. Any other reports would have to be developed. The program has filters available for all reports and in-house staff should be able to tailor reports as needed.

Conversion of Databases

Data can be converted from DOS systems and from other ASCII data. Conversion costs \$1000 per day and usually takes 1-2 days—more if a large or complex database is being converted. The main problems encountered in conversion are

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inconsistency of old data and integrating data conversion with on-going operations.

From Legal Hotline Project Staff

The primary benefit of this program is its ability to integrate with many different applications. The software integrates with Word Perfect and Word, and HotDocs as well as calendar applications such as CompuLaw and GroupWise. A strong feature is its ability to view documents not associated with the program. Documents can be shared via encrypted e-mail. This feature, however, makes the conversion of old data especially cumbersome.

The ability to create tabs, with as many associated fields as you would like, is also a unique feature of this system. The system can also search the database for information on many different levels.

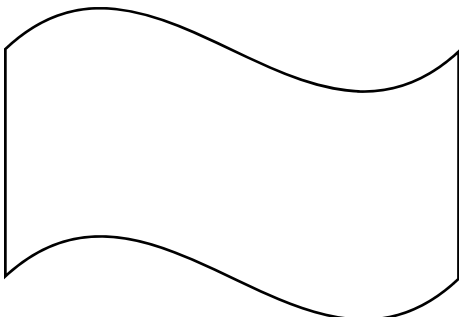
The program is driven by separate sections for Matters, and Contacts, with multiple tabs in each of those section for the various functions (*please see sample screens on pages 13-14*).

It is an expensive system requiring powerful computer and memory capabilities because its Sybase database has a high level of sophistication.

What the Users Say:

The Legal Services adaptation of ProLaw is currently in use in 4 Michigan legal services organizations, with state-wide participation to be phased in, pending results of the pilot project report at the end of the summer.

Many of the key features of the adaptation have not been implemented yet, therefore user feedback is limited and premature. For in-depth information on users' experiences with the software, we await the results of the pilot project report



EQUAL JUSTICE NETWORK WEBSITE

www.equaljustice.org

For Legal Hotline information on the internet visit the Equal Justice Network Website. The site is sponsored by the Project for the Future of Equal Justice, a joint activity of the **National Legal Aid and Defender Association** and the **Center for Law and Social Policy**.

The Network is intended as an on-line meeting place and information source for lawyers and other advocates involved in the delivery of legal services to low-income people.

Legal Hotlines have their own section of the site called the **Legal Telephone Hotline Forum**. The Legal Hotline Technical Assistance Project is a content provider for the Forum. You can find an on-line directory of legal hotlines and add your program; there are in-depth operations profiles, and technology profiles from various programs; articles of interest to legal hotlines; and a Best Practice Tips area where you can view or add practice tips.

There are also an on-line discussion groups where you can read and post comments about topics of interest. Currently, there is a discussion thread posted regarding the California Bar Ethics Opinion on Telephone Legal Services. You can start your own discussion thread on any topic you wish to explore.

The Equal Justice Network also has forums on Pro Se Law, and



Technology and Legal Work There are links to legal

What Does a Hotline Attorney Really Want ? (from her computer)

*by Carol Matthews**

After her ears, the computer is a Hotline attorney's most important tool. This article will address the question (to paraphrase Freud) of what do HL attorneys really want. The quick answer is that we want a computer that will work *with* us and not *against* us; computer software that is more servant than master. In short, when a HL attorney is entering information in the computer we want it to be gracious and accommodating; when we are retrieving information we appreciate both speed and generosity.

When it comes to entering clients/ case information the key word is flexibility, and few programs are as flexible as we could wish. The problem arises from the fact that computer programmers tend to be logical types, who think linearly and design programs with a series of logical steps whereby one begins at the beginning and proceeds inexorably to the end in a logical progression. Programmers think this is a reasonable and natural way to do it. Reasonable maybe, natural, no. At least not always for the HL attorney and seldom for the client. A HL attorney is apt to be more of a people person, one who is perfectly comfortable allowing the client to tell his story in his own way— even if that means starting it he middle, which it usually does. In fact, a HL attorney may see actual merit in allowing a client to proceed in his own fashion with only occasional interruptions to feed the computer its due. If this means filling in demographic fields out of order, so be it. Why should the computer care where one starts?

An otherwise logical program could be made user friendly to the HL attorney with a warm, fuzzy brain by building into the program the flexibility to allow three things. First, the program should allow required information to be entered in any order. Second, most fields should accept some form of "I don't know" as an answer. There is no need to turn law abiding lawyers into liars just because the client is unaccountably ignorant of such things as his age

e-mail comments to: cmatthews@aarp.org

**Carol Matthews is a Hotline Attorney at Legal Counsel for the Elderly in Washington, D.C.*

or income. Third, there are times when it is essential to stop in mid-case. It should be possible to exit from a case immediately in an emergency. A program that provides some sort of override for required fields would be appreciated. Naturally, it would be desirable for the computer to remind us later, very politely of course, that we have unfinished business to attend to.

Another major function of the computer is to retrieve information about a particular client. Usually, the first thing a HL attorney does when talking to a clients is to enter the client's name in the computer to check for conflicts and prior history. The computer then spits back all the clients with the same name. A useful computer would also give back all the clients who live at the same address or have the same telephone number. For any given client, the computer should provide an easily accessible history of prior cases involving the client. A good system would let you see at a glance what the earlier cases were about., the date and person who handled it, and the outcome. An even better system would tell you whether the client is competent, truthful, loyal, trustworthy and kind, and whether he listens to and follows advice. The perfect computer would nag the client until he did as he was advised.

There are many useful tasks a computer should perform. For instance, when a HL attorney is opening a new case it is important to be able to keep the case open pending new activity. The "tickle" system should prompt the attorney to follow up on a particular matter. The computer should serve as a resource for such things as available publications, referral options, appointments, etc. Some computers store form letters that are practically ready for mailing. Such a smart computer could surely take on a few more jobs, such as keeping track of my library books, telling me to pick up the dry cleaning, and even reminding me of my niece's birthday. At the end of every day my computer would tell me what a terrific job I had done today and how much it was looking forward to working with me tomorrow.

REVIEW OF TIME

FROM WESTERN NEW YORK LAW CENTER

MATERIALS

The Western New York Law Center provides free civil legal services for low income people. In addition to writing software for centralized telephone intake programs, it installs local area networks and develops websites. The Center Director, Jim Morrissey, was previously the Project Director at Neighborhood Legal Services in Buffalo, which was the first Legal Services Corporation program to use telephone intake supported by specialized intake software.

Tom Karkau, now with WNYLC, was the computer architect for the original NLS Intake and Timekeeping software.

Although TIME has been available only since 1997, there are 30 programs currently using the software.

Cost

A license for TIME can be purchased for 1/10th of 1% of a program's annual budget per year. There is a minimum cost is \$250 per year, and a maximum cost of \$1000 per year. The license allows a multi-user, multi-site operation.

Training and Technical Support

The cost of the licenses includes one day's free training at the WNYLC offices. Little or no training is needed to learn the system. The license includes unlimited telephone support for the first 90 days after installation after which unlimited e-mail support is offered. The software has been updated several times since it was introduced 12 months ago. For example, when LSC began requiring that programs keep track of court cases, a new version of the program was issued. Updates to the software are free of charge.

Features

TIME uses computers to relieve staff from mundane tasks. It allows the user to do client-look-up, conflicts checks, and time keeping, with the click of a button. It also easily generates client letters and produces reports. The program is easy to learn and requires no on-site training.

Specifications

The software needs Windows 3.11, Windows 95, or Windows NT to operate. It is written in Visual FoxPro with a FoxPro database. It requires an IBM compatible computer of 386 or better; 8mb

RAM and 10mb of disk space.

The software can be locally networked and accessed remotely via a modem using products like PC Anywhere. Users cannot launch their e-mail programs or internet browsers from within the software. The reason for not providing direct Internet access stems from the fact that Time supports Window 3.11 (and up). Time will soon offer a Windows 95 version of the software so that it can take advantage of some of its features. However, choosing software that operates only on Windows 95 may mean that programs will need to upgrade their hardware significantly in order to use the software.

There is no limit to how many people may use the system simultaneously.

Back-up is accomplished via the normal user procedure. WNYLC does not supply the source codes for in-house modification because product support would become too difficult. Additional reports can be written using software programs like R&R that retail for about \$100.

Client Information

Initial client information input takes about 2-5 minutes. It is all done on a single level and requires nine screens to complete. (*Please see sample TIME screen on pages 19-22*). The initial search results in a display of all the cases for that client, including case numbers, date opened, and casetypes. The client's address is not included at this level.

The case information screen is tabbed to allow access to various data randomly, so that input can be done sequentially without having to enter separate systems. Only the systems administrator can delete cases created erroneously. This works as a fail-safe so that no information is lost by mistake.

The software numbers the cases automatically. It contains client information fields for contact person, income, ethnicity, county, citizenship, referral methods, social security number, age, gender, and primary language. The software provides 16 user definable fields and the demographic information is one area where it is possible for in-house staff to change or add fields.

Conflicts Checking

The system automatically checks for conflicts by comparing names of new clients and names of adverse parties.

Continued on page 17

Tickler and Scheduling

The tickler feature can selectively print tickler items and add or delete items as needed. Ticklers are not erased when a case is closed. The software does not have a scheduling feature.

Casenotes and Services

The software has an unlimited notes field but the WNYLC does not recommend it be used to keep track of work on cases. Rather, WNYLC has woven into the software a timekeeping program that fulfills basic time keeping requirements but also provides an instantly available chronology of all activity logged to the case by date and advocate with a description of the activity.

Look-up tables are available for most fields; case types and service codes can be easily added or changed. The program has user configurable tables that would allow the user to indicate materials to be mailed out.

Referrals and Accounting

TIME can track referral to agencies, *pro bono* or panel attorneys. The software can match clients to appropriate referral sources for their case type and location as well as for attorneys' special training and languages spoken. The software can track appointments made to panel attorneys.

The software does not track billings to referral panel attorneys. However, since the data stored contains information that could be used for billing, it is possible to effect some modification for this purpose. The software does not print appointment reports, billings, or labels for a referral panel.

Wordprocessing/Reporting

The software uses the wordprocessing built into the data base program. Users can create simple documents. It can easily generate client letters that can be edited by the user before printing..

TIME does not generate a masterprint of all cases worked on in a given day nor print client information forms except individually for each case. It can generate reports for multiple sites.

It runs reports based on demographic information, referrals, number of clients, number of cases, activity reports, number of services, staff time reports and all LSC required reports.

The in-house staff will not be able to tailor the reports in Time. However, this reporting configuration was the only way to keep the costs of the program low. Programs may add R&R report writer. Some programs are able to configure their reports

Conversion of Databases

Any data, including PICK data, can be converted if it can be exported into comma-delimited ASCII format that is readable on a Window/DOS PC. The conversion process usually takes 24-40 hours at a cost of \$ 85 per hour. The main problem encountered in conversion has been the quality of the old data.

From Legal Hotline Project Staff

TIME was developed for the specific needs of a legal services organization with a telephone intake system. A demo version of the program can be downloaded from WNYC website at www.wnylc.com. The version is fully operational, except that it will only allow a limited number of records to be input. This allows a program to try out the software before making any decisions. Project Staff found it very simple to use, even with no training. (*A detailed review of TIME was published in the Summer 1997 issue of the Quarterly.*)

Although the software cannot launch e-mail or Internet browsers, the user will be working in a Windows environment and can simply access his e-mail or browser by clicking to another Windows function. Each program will have to determine how important the internet launching feature is to their program. True internet enabled software, which permits information from the database to be moved via the internet, is an important feature which is not available from all of the providers. Users agree that the Time is friendly and capable of fulfilling basic data collection and reporting needs.

What the Users Say:

TIME is being used at 30 legal service programs. Four programs submitted a written survey to the Quarterly staff. There are Niagara County Legal Aid (NCLAS), which had the software installed in 1997; Channel Counties Legal Services, (CCLS.) which got the program in 1996; Legal Aid Society of Columbus Housing Hotline (CHH) which got it in 1997. The newest user of the software in the Legal Hotline for Older Iowans, (Iowa) which just got the software installed in 1998. All four reporting programs run the software on Windows 95. NCLAS has 11 users; CCLS has 10; two of which work off-site. CHH has three and Iowa has five.

The users observations are recorded below. Their ratings are recorded on the Time User Table on page 23. The numerical ratings are averaged in the Users Satisfaction Table on page 33.

Continued on page 18

Three of the programs rated the Systems Administration "4", while Niagara rated it "5". The only written comment on this section was provided by CCLS: "We use a systems administrator— it would be difficult to let a group of users configure and reconfigure a data base."

Training and Installation

NCLAS was a pilot program for this software. They received three hours of training from WNYLC, included in the cost of the software. The sufficiency of this training was rated as "5". NCLAS estimates that 2-3 hours of training is needed for proficiency. The survey completer states: "The program is very user friendly. Minimal training is needed to actually run the program." NCLAS receives technical support by phone, e-mail, and site visits if necessary. (Niagara Falls is not far from the Buffalo offices of WNYLC).

CCLS states that its yearly license fees includes phone, fax and e-mail support but they received no training from WNYLC. The survey completer at CCLS believes that a week of software use with help from the provider, is needed for proficiency. He commented that the costs, training and support are reasonable and gave it a "4". "You can't expect hands on site training for the \$500/\$600 program cost," he noted.

CHH reports that the software cost included no training, nor did they receive any. They believe almost no training is necessary to achieve proficiency, "just practice using it". The reporter states "this system is so easy to use even my non-computer literate attorneys picked it right up." They receive technical support via fax, phone, and e-mail, and rate the support at level "4".

At Iowa, the only training they received was from a manual. Like NCLAS, they believe 2-3 hours of training is needed for proficiency. The support they receive, rated "4", is rendered by telephone and e-mail.

Client Information/Conflicts/Tickler

CHH finds the client information section of the software to be "very well written and covers almost everything we need to capture."

With regard to the conflicts check. CHH "wish (es) it contained a social security number check."

None of the programs made comments on the casenote section. Iowa noted that the referral function "only allows referral to one attorney instead of 3-4".

NCLAS uses Word Perfect for its wordprocessing functions; but comments "however, the TIME Program is extremely capable of generating form letters." CCLS laments the lack of a report generator or connection to a wordprocessor. The person states "I wish it exported to Word or Excel." Iowa finds that that Time possesses "a very simple wordprocessing function. Does not allow underlining, changing fonts, etc. The functions that are included are easy to use."

Reports

Iowa finds that the software runs only some of the reports the program needs. They state "Software does not print reports from many of the user defined fields. It does print all LSC reports."

CCLS says "We would like a report generator (to be) able to sort and tabulate as we require not just pre-formulated reports they use in New York. (*Ed. note. The only program which rated the reporting program at more than a "3", was the Niagara County program in New York State, "5".*)

CHH similarly found "we need to be able to do ad-hoc reporting and modify the reports which we cannot do." That program found the reporting function "Not flexible enough."

Data Conversion

CCLS converted from a previous similar version of legal aid software. It took about 48 man-hours. The smoothness of the conversion was rated as "1". The program had to manually enter all data from the old legal aid program to TIME. It would have cost \$2,200 to have the programmer write the conversion. They found the process "difficult at best".

NCLAS converted for the Neighborhood Legal Services Client Intake program. The conversion took about 1 hour, but since they were a pilot program they did not have to pay for the conversion. There were some bumps that had to be ironed out but once they were, the conversion went smoothly.

The average overall rating for Time was 4.25.

Recommendations

Time User Satisfaction Survey
(Blank space indicate no response given)

NCLAS

CCLS

CHH

IOWA

FROM WINCASES

WinCases is a joint venture of Mike Holmes, formerly of Wamsutta Software and Joe Goldsmith, formerly of Professional Business Solutions. They have over 17 years experience working with legal services and *pro bono programs*. WinCases is optimized for use in a hotline program. It is brand new and has not been installed anywhere as yet. Mr. Holmes made its introductory demonstration on July 11, 1998, at the Legal Services Southeast Project Managers Meeting in St. Petersburg, Florida. The predecessor software, written for DOS, currently in use at 65-70 programs.

Cost

The price of the software varies somewhat based on requirements. WinCases offers a variety of license configurations: single or multiple-user; multi-site; LAN; WAN; or Internet. Typically, a single user license costs \$1250 each for a new license, and \$625, for an upgrade. A multiple user/primary site license costs \$2500.

Training and Technical Support

On site training is extra. Telephone support is free. The amount of training needed to use the system varies with each user's background but generally little training is needed. Technical support can be provided over the phone, or via PC Anywhere. Web-based training and support are also offered.

WinCases provides a user maintenance agreement which includes free upgrades and support. To be eligible for the free support, the program must have the current version of the software.

Features

WinCases is internet enabled and network ready. It features "data-at-a-glance" technology and uses the notebook tab metaphor. The software is fully integrated with a Microsoft Word equivalent wordprocessor; its files are compatible with any wordprocessor on the market. WinCases also contains a report writer, unlimited data and notes storage and many levels of security for users, tables, and fields. The security function is also user definable.

WinCases runs on Windows 95. It is written in Visual FoxPro. Its database is FoxPro, SQL anywhere with an MS SQL server. Any type of hardware that will run Windows 95 is sufficient for WinCases.

The software supports e-mail, network, remote and internet access functions. It has a separate report generator. There is no limit to the number of people that can work on the software at the same time.

There is a back-up system embedded in the program. The user can choose automatic or manual back-up.

WinCases does not provide the source codes to users because any changes made by the user would make it impossible to use the subsequent software upgrades. However, WinCases has an open and active data dictionary that allows users access to the inner workings of their forms and data structures, and permits them to define many functions.

Client Information

It generally takes just a few minutes to do an initial client information input. All the information goes on the same form. The initial intake takes one page with two tabs- one for demographics and one for assets and income eligibility. The tab navigation means flipping of pages or screens is unnecessary. In addition, the user can view multiple clients' data, at one time, on one screen..

A client's case list is displayed with case numbers, date opened, address and case type. All input can be done sequentially without moving to separate systems. It is an integrated true Windows program.

A case created erroneously can easily be purged. In order to safeguard against loss of data by mistake, both data validation and roll-back features are integral to the program.

The creators have sought to optimize the entry of new cases for an existing client. The program automatically numbers cases. The demographic fields are user-defined but pre-programmed. They contain the following types of information: contact person; income; ethnicity; county; citizenship; referral methods; social security number; age; interested party; opposing party and more.

Conflicts Checking

The system checks the client, client's spouse, and opposing parties for potential conflict. The check is performed in an eye-blink. *Continued on page 25*

Tickler and Scheduler

The software's tickler system can selectively print tickler items. Tickler items can be added or deleted. The system does not erase tickles when a case is closed but, as an option, can erase them automatically when the reminder date has passed.

The scheduler can note appointments, meetings, and group meetings. It can detect scheduling conflicts as well as schedule room and equipment use.

Casenotes and Services

The number of casenotes that can be input is limited only by the disk capacity of the computer system. The casenotes are date-stamped and automatically identified with the person inputting them.

The software automatically assigns times to each activity. It provides look-up tables for most fields. Casetypes and service codes can be easily added or changed.

The user may enter codes for materials to be mailed out and the program can generate mailing labels for those materials.

Referrals and Accounting

The software can track referrals to agencies, *pro bono* attorneys and fee-panel attorneys. The software can match the client to an appropriate attorney or referral source either automatically or with user intervention. Clients can be matched for casetype, location, handicap access, language, and the case load of the attorney.

The software can track appointments and billings for referral attorneys and print reports and mailing labels for the referral activities.

Word-processing/Reporting

A full-featured MicroSoft Word equivalent program built into WinCases, which is compatible with any wordprocessor on the market. Along with the usual text functions such as bold and underline, the WinCases wordprocessor also supports mail merge, graphics, special formatting and any installed printer.

The software can generate a masterprint of all cases worked on in a given day. It can generate reports from multiple sites, and print client information forms for one or many clients.

It can run reports for: demographic statistics; fee 25
-panels; referral; units of service; number of clients; number of cases; number of services; service types; calls-per-hour; cases-per-hour; cases-per-county; referral methods; activity reports. It can also run many others including LSD, CSR and IOTA required reports. WinCases has a full featured report writer built in, with user defined parameters and page layout capability.

All reports have filters available and reports may be tailored as needed by in-house staff.

Conversion of Databases

A routine converting the predecessor "Cases" program to WinCases has been written, and conversion for those programs will be automatic.

Data from DOS and PICK systems can be converted. The price of conversion varies by the system. Mr. Holmes expects old data to be sent to his offices where it will be converted. That process might take 1-2 weeks, depending on the complexity of the data. Once that process is complete, the actual on-site conversion should just take a matter of hours.. The main problem encountered with conversion is that, with the exception of Wamsutta's "Cases", there are no normalization or integrity checks built into the other systems.

From Legal Hotline Project Staff

Unfortunately, there is as yet no demo disk for the Windows version of this software. Sample screens are included on page 26 of the Quarterly. Because it is just coming onto the market, there are no users of the Windows version either. Since a Windows program is so inherently different from a DOS one, DOS user information did not seem relevant for inclusion.

Since WinCases is one of the few software packages designed for use by legal hotline/telephone intake projects, and appears suitable for use by programs such as those comprising the readership of the Legal Hotline Quarterly, we include it to make this issue as complete a resource on hotline software as is possible at this time.

SOFTWARE FEATURES TABLE

SOFTWARE FEATURES	Clients	ProLaw	Time	WinCases
<i>Specifications</i>				
Number of programs using the software?	150 (all Windows versions)	4	30	Windows O DOS 65-70

Software Features	Kemp's	Pro-	TIME	Win-
<i>Costs & Training</i>				
What is the total cost of the software?	\$2900 for '98 plus options	\$280 per user, if state	1/10 of 1% of program	\$2500 for multi-user
Is a multiple user license necessary?	No, but additional charge	Yes, license is per user	No, license allows multi-user	Yes; variety of configuratio
Does the cost include training?	No	Additional cost	Yes; 1 day at NY	On-site training
How much training is needed?	Approx. 1/2	Moderate to	Little or	little
Does the cost include technical support?	Most calls are not billed.	No	90 phone support;un-	Yes; phone support is free
How is technical support accomplished?	phone, local consultant, remote access, email, website,	Website, email, remote access,	phone and e-mail	Phone; PC Anywhere and website
Do you provide a maintenance contract?	No	Upgrades on website and support	Yes; all updates are free	Annual fee includes free upgrades
Client Information				
Is it possible to easily view old client cases?	Yes	Yes	Yes	Yes
How long does it take to complete new client	About 2-5	2-5	2-5	A few
Does all the input occur on one level or is some information entered on sub-levels?	Multiple screens tied together with	multiple tabs on 2 screens	single level	All on same form
How many screens are needed to complete the	4	5-9 tabs	9	1 page; 2 tabs
Can one obtain a list of all cases for a client?	Yes	Yes	Yes	Yes
Does the client/case list display the case numbers	Yes	Yes	Yes, but not address	Yes
Can summary information be changed easily?	Yes	Yes	Yes	Yes
Can input be done sequentially, without moving to separate systems for services, appointments. etc ?	Yes, using tabs or buttons	yes, via tabs and screens	Yes, via	Yes
Can an erroneously created case be purged immediately?	Yes	Yes	No,	Yes
Is there are fail-safe so that data is not lost by mistake?	Yes	Yes	Yes	Yes;

Client Information	Kemp'	Pro-	TIM	Win-
Does the software perform an efficient database search for client name, telephone number, conflicts data, etc.	Yes	Yes	Yes	Yes
Is there an efficient way to enter new cases for	Yes	Yes	Yes	Yes
Does the program provide for numbering and	Yes	Yes	Yes	Yes
Please check which client information fields the				
Contact Person	Yes	Yes	Yes	Yes
Income	Yes	Yes	Yes	Yes
Ethnicity	Yes	Yes	Yes	Yes
County	Yes	Yes	Yes	Yes
Citizenship	Yes	Yes	Yes	Yes
Referral Method	Yes	Yes	Yes	Yes
Social Security Number	Yes	Yes	Yes	Yes
Age	Yes	Yes	Yes	Yes
Other	Many	Many	Primary Language	Parties;
Can in-house staff change or add fields to the data base?	Yes user - defined fields; you can	Yes	Yes; 16 user definable fields	Preprogrammed user defined fields
Can restrictions be placed in database such as clients over 60; clients in certain areas?	Yes	No	No	Yes
Conflicts Checking				
Does the system check for duplication of clients?	Yes	Yes, in	Yes	Yes
How are conflicts checks performed?	Four methods: 6 way; 4 way; 2 way,	Search lists all matching names	Checks "new" clients & "adverse"	clients; spouses & opposing parties are
How long does it take to run conflicts check?	Depends	5-30	0-2	Eye-

Tickler/Scheduler	Kemp'	Pro-	TIME	Win-
Does the program have a tickler system?	Yes	Yes	Yes	Yes
Can you selectively print tickler items?	Yes	Yes	Yes	Yes
Can you add or delete tickler items?	Yes	Yes	Yes	Yes
Are tickles erased when a case is closed?	No	No	No	No; when
Describe scheduling features:	Group calendar that schedules, tickles appointments, events and	Docket items; integrates with GroupWise Calendar /	None	Appointment ;meetings room use; scheduling conflicts
Casenotes and Services				
Is there a limit to the amount of casenotes that can be entered?	No	16 pages; but unlimited notes can be added as	No	No
Can existing casenotes be easily accessed?	Yes	Yes	Yes	Yes
Can casenotes be added efficiently?	Yes	Yes	Yes	Yes
Are casenotes date-stamped?	Yes	No, but docket time	Yes, at user's option	Yes
Are the casenotes identified by attorney?	Yes	No, but docket item	No	Yes
Is timekeeping automatically assigned for each	No	No	No	Yes
If not, can time-keeping be easily	Yes	N/A	No	N/A
Are look-up tables available for most fields?	Yes	Yes	Yes	Yes
Can casetypes be easily added or changed?	Yes	Yes	Yes	Yes
Can service codes be easily added or	Yes	Yes	Yes	Yes
Can the user enter codes for materials to be mailed?	Yes	Yes	No	Yes
Can the program generate mailing labels	Yes	Yes	No	Yes
If mailing functions do not exist can the	Yes	Yes	Yes	N/A

Word Processing	Kemp's	Pro-	TIME	Win-
Does the program access a word processing	Yes	Yes	No	Yes
Which word-processing system is used?	Windows based	WordPerfect	N/A	Full- feature
Does the software easily generate client letters?	Yes	Yes	Yes	Yes
Can the software be used to create legal or other	Yes	Yes	No	Yes
Printing/Reporting				
Can the software generate a masterprint of all cases worked on in a given day?	Yes	Yes, opened or closed on	No	Yes
Can the software generate reports for	Yes	Yes	Yes	Yes
Can the software print client information	Yes	Yes	No	Yes
Please check which reports can be generated?				
Demographic statistics	Yes	Yes	Yes	Yes
Fee-Panel	Yes	Yes	No	Yes
Referrals	Yes	Yes	Yes	Yes
Units of Service	Depends on how	Yes	No	Yes
Number of clients	Yes	Yes	Yes	Yes
Number of cases	Yes	Yes	Yes	Yes
Number of services	Yes	Yes	No	Yes
Service types	Yes	No	No	Yes
Calls-per-hour	Yes	No	No	Yes
Cases-per-hour	Yes	No	No	Yes
Cases-per-county	Yes	Yes	No	Yes
Referral method	Yes	Yes	No	Yes
Activity Reports	Yes	Yes	Yes	Yes
Other	Any info gathered can be reported	Reports would need to be developed	LSC req. reports; staff time	LSC; CSR IOLTA; built in report

Reporting/Printing	Kemp's	Pro-	TIME	Win-
Can the program produce sub-routine reports?	Yes	No	No	Yes
Does the program have filters available for all reports?	Yes	Yes	Yes	Yes
Will in house staff be able to tailor reports as needed?	Yes	Yes	No	Yes
Referral and Accounting				
Does the program track referrals to:	Yes	Yes	Yes	Yes
<i>Pro Bono Attorneys</i>	Yes	Yes	Yes	Yes
Fee Panel Attorneys	Yes	Yes	Yes	Yes
Can the software match the client to an appropriate	Yes	No, but can	Yes	Yes
Which factors can the software match?	Yes	Yes	Yes	Yes
Location	Yes	Yes	Yes	Yes
Other	Previous		Specialties;	language;
Can software track appointments to referral lawyers?	Yes	Yes	Yes	Yes
Can the software track billings for panel attorneys?	Yes	Yes	No	Yes
Can the software print appointment or billing reports for	Yes	Not yet	No	Yes
Can the software print mailing labels based on referral	Yes	Not yet	No	Yes
<i>Conversion of Databases</i>				
Can old data from DOS be converted?	Yes	Yes	Yes	Yes
Can old data from PICK be converted?	If exported to another	Yes, if ASCII	No	Yes
What additional costs are involved in	\$95 per hour	\$1000	\$85 per	Varies
How long does conversion usually take?	8 hours	1-2 days	24-40	1-2
What problems have you encountered in conversion?	Quality of input!	Inconsistency of old	Data Quality	Lack of data

SOFTWARE USER SATISFACTION TABLE

Software Features	Clients	Time
<i>System Administration</i>	4 program average	4 program average

Software Features

Clients

Time

Client Information Section

Software Features	Clients	Time
Overall rating for referral/accounting:	3.6	4

The End