Components of a Good Hotline Software Program

Intake/Client Registration

The software should contain all fields of demographic information that must be collected by the program. All case handlers should be able to enter information in a client's record about a case. This gives hotline staff a summary of the facts, issues, and service provided to a caller. The demographic data can be reviewed or appended at any time by other case handlers working on the case. In order to ensure the quality of the database, entries should only be made by persons with a vested interest in its accuracy. In practice this means that entries should be made only by program staff and not by temps hired for the purpose.

Casenotes

The hotline attorney enters casenotes directly into the computer either during the call or as soon as it is completed. In most software systems there is no limit on the space available for notes. It is a good practice not to permit editing of the casenotes after their final entry in order to preserve the integrity of the system. Casenotes should be instantly retrievable by subsequent case handlers so that a complete history is available while a caller is on the phone.

Conflicts of Interest

Conflict checking should be an automatic feature of the program. At the time a client's name is entered in the record, the computer program checks all other clients with that name who have either previously contacted the program or who have been adverse parties in cases of others served by the program. The conflict check is informational, a tool to assist the staff to make a decision about whether the client can be served.

Tickler

Tickler processing provides a means to remind attorneys or other case handlers of important dates associated with the case and recommended action to be taken. This works best if it is automatic, that is, when the case handler first logs on the system, his or her ID is checked against all cases that have been flagged with a tickle date of the current day or earlier. These cases and corresponding tickle information appear on the screen. Some programs require that the staff person request a list of his/her tickles. A tickler system can also be used to request another staff person to review the case or provide assistance.

Calendar/Scheduler

The software should allow staff to schedule client appointments, meetings, hearings etc.

Document Assembly

A good document-assembly program permits the user to efficiently generate letters, forms, and documents. Information from the databases is automatically inserted into the documents as they are created.

Reports

The software should allow each case to be type coded, in accordance with the program needs. This will allow easy record keeping on case types, problem types and more specific problem descriptions associated with them. Each service provided should be defined and pre-coded. Codes may have automatic associated timekeeping; if they do not, the case handler will have to enter actual time expended for each service. The system should have a report generator that creates a series of core reports that are used regularly by the program as well as *ad hoc* reports created in response to specific program needs that may change from time to time. One of the most critical reports necessary for quality control in any hotline is a daily printout of all hotline casenotes and activities.

Timekeeping

The software should have the capability to maintain timekeeping data sufficient to meet the requirements of the Legal Services Corporation or other funding sources.

Mailings

The program should have a service mailing function that generates mailing labels singly or in batch for mailing of publications, letters, surveys, etc.

Referrals

This component matches clients to internal or external case handlers. If the hotline attorney determines the case has merit and further action is required, he or she will match clients to referral attorneys, or will make an in-house appointment for further services. The software should be capable of making the match based on specified criteria such as case type, geographic location, etc.

Billing

If the program has any plans to bill for services or collect any fees from referral attorneys, a billing component will be useful.

Linking Multiple Offices

This can be very tricky but there are several ways to handle this from sophisticated servers that can link multiple sites through the Internet to simply exchanging data via fax or e-mail. It is important to select a system that will work for a particular program.

Maintenance

Any software program should be easy to use and to maintain. Many programs will not have a computer technician available on a regular basis to assist with problem resolution. System management functions are often performed by some other staff member. These include:

- *Adding/deleting/modifying code tables*
- *Adding/deleting/modifying user information.*
- *Adding/deleting/modifying referral information.*
- *Performing daily backups of all data files.*
- *Performing case archiving to remove cases from the active system.*
- *Creating core and ad hoc reports.*
- *Creating scripts for documents.*
- *Accessing utilities for modifying the system operations parameters.*

A specific staff member should be designated who will be responsible for handling computer problems. A good internal "help" program, excellent documentation, and reliable technical assistance by an 800 line and/or email are all very important to the successful management of the software program. Some multi-office programs have a troubleshooting computer technician who makes regular rounds of the program sites.
If programs acquire their software through an Application Service Provider, software support is usually included in the contract and performed over the

Internet by the Provider. Be sure to check the response time to requests for help provided by the vendor or ASP.