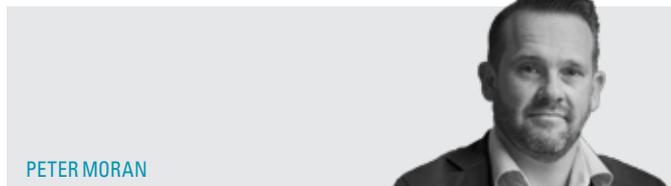# CASEFLOW

This web-based application provides a workflow process for law firms.

PETER MORAN

Which practitioners would find this technology useful?

Law firms managing volume work in one particular type of matter or legal service offering.

How does it work?

Caseflow provides a workflow process that is pre-built by Caseflow depending on the particular category of matter. Once a matter is opened within the workflow, team members and managers can easily track their progress through the different stages of the matter. As certain workflow tasks need to be completed, Caseflow will allow the task to be completed within the system at the click of a button: eg, the creation of documents.

A variety of different views are available in Caseflow. A landing page gives a snapshot of all matters and the status of each matter. From that page, matters can be drilled into and additional information accessed.

A dashboard view can be configured to show a range of information, such as a variety of customisable graphs and data boxes to show summary information across matters and matter categories. For example, a user could have a bar graph showing response times for matters after receiving instructions or a pie graph showing the progress/stage of each matter in a particular category according to numbers or percentages.

A chronological view of a matter then shows all actions and tasks that have been undertaken in a matter and essentially forms the "file" for the matter.

A further way of viewing Caseflow data is by tasks. From the task page, users can complete their work and update the task list as completed. Documents can be created at the click of a button from the task page.

The query page also provides an expansive functionality of searching for and obtaining data within the Caseflow database. Because queries can be easily created from a range of fields, the function effectively enables an in-built report writing capability. More complex customisable reports and reviews of data can also be created by Caseflow in the background which again allows substantial access to data.

Benefits

A key benefit of Caseflow is its ability to integrate with a variety of other software systems, thereby working as a form of glue between systems. For example, it integrates with a number of major document management systems (DMS) such as iManage, net documents and Worldox which means that data from Caseflow can be automatically populated into the DMS database and Caseflow can effectively operate as the front end of the system.

Caseflow also integrates with a number of major practice management and CRM systems as well as systems like Infotrack, PEXA and Docusign which again can avoid the double handling of data entry between systems and also provides a central interface through which all such systems can interact.

Caseflow also offers a client web portal functionality.

Task reminders can be integrated into Outlook tasks and also reassigned to different team members (including en masse reassignments which can make the transition between staff members much more streamlined.

All changes in the system are tracked and an audit record kept of every step.

Logins are through multi-factor authentication.

Costs

Charges are on application but are either charged according to a project specification or on a per matter basis dependent on the nature of the service and the extent to which Caseflows solutions are provided.

Risks

Confidential information is contained whin the Caseflow database and firms need to ensure the usual cybersecurity measures are in place in terms of protecting access into the web-based system. As Caseflow does not host data, it is up to firms to protect the data through their on-premises or virtual server cybersecurity processes.

Downsides

Caseflow cannot operate as a DMS because it does not index or version control documents. Documents, therefore, cannot be searched within the system. ■

Peter Moran is managing principal at Peer Legal and founder of the Steward Guide, an online technology guide for lawyers (www.stewardguide.com.au).

SNAPSHOT

What is Caseflow?
A workflow and matter management system with automated documentation

What type of technology?
A web-based application that can operate in both on-premises or virtual servers (hosted option not available)

Vendor
Caseflow Pty Ltd

Country of origin
Australia

Similar tech products
Workflow systems such as Asana, Monday
Lawdocs
Workflow systems within existing practice management systems
Mattersphere
Systems built specifically for matter types (eg a conveyancing system)

Non-tech alternatives
Paper file systems

More information
www.caseflowacumen.com