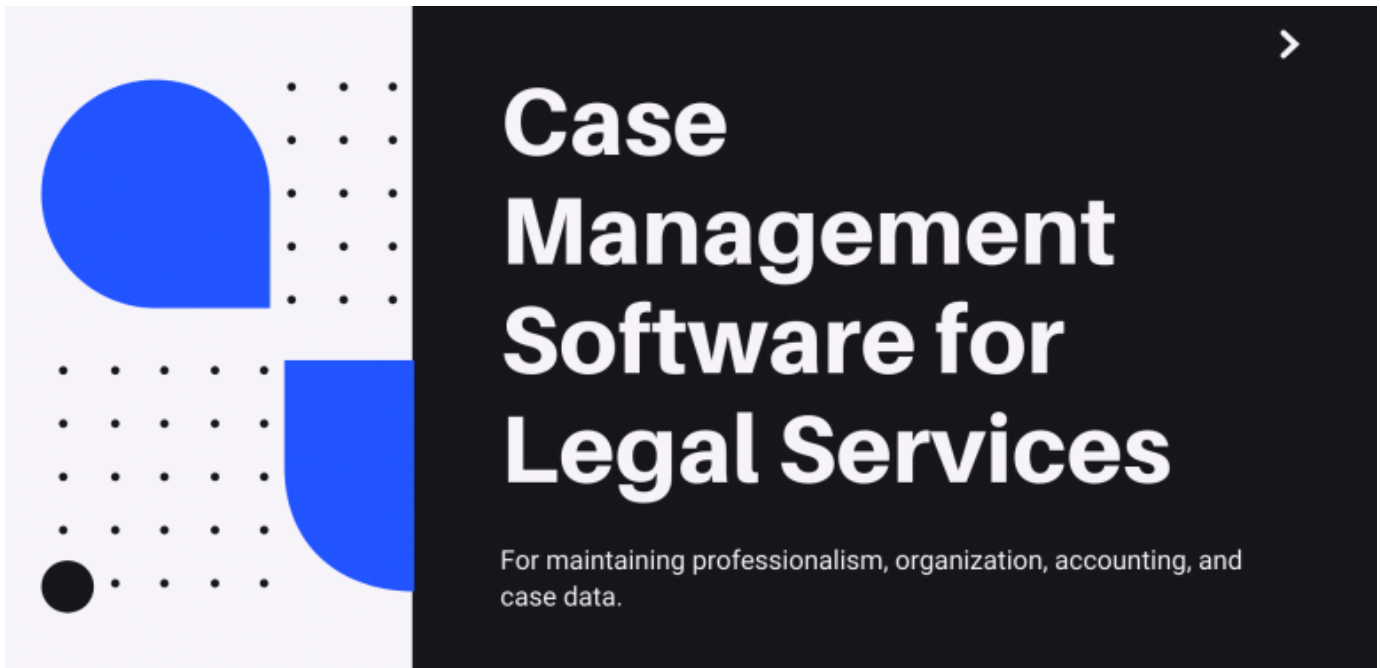# Case Management Software for Legal Services

What are case management systems (CMS)?

Case management systems allow legal aid programs to consolidate case and client information in a central and secure location. These types of software also manage client communication, accounting and billing, document assembly, compliance, etc., fostering more successful results and streamline workflow. CMS also provides added layers of up-to-date, compliant security for sensitive information.

Why are case management systems important for legal aid?

CMS are critical for the optimization of office communication and centralizing case data to more efficiently run a legal program. Tracking and centralization also allow programs to easily meet reporting requirements, and track any community outreach projects. Additionally, CMS protect sensitive client information and prevent loss of data.

What case management systems are available for legal aid programs?

There are numerous systems that may be right for your program, from key features to pricing. The following are popular legal aid case management systems that emphasize organized workflow and security for legal practice management.
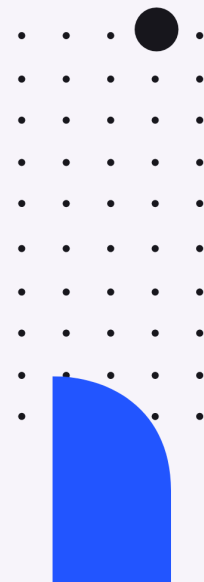
Kemp's Case Works

Kemp's Case Works

- Case management software created for legal services, aids, DV shelters, and other advocates for low income groups
- Prime Case Management System (Prime 16)
- Currently in 35 states and some foreign countries

Key Features

- Online Application System
  - Optional module for applicants to complete intake forms online
- A2J Online Intake
  - Automated import of A2J interviews into Online Intake ScreeningSystem
  - Can be changed and updated to reflect current interview versions
- Reporting services (KRS)
  - Add-on for schedule reports, data mapping, and long-term comparison reports
  - Admin can use reports for updates on events
  - Automated and manual

How it's built

- **Prime 16 Standard**
  - Uses Microsoft SQL Server (for power and data storage)
  - Microsoft Office Access for forms, reports, queries, menus
  - Installed directly on site
- **Prime 16 Cloud**
  - Web-based version
  - Hosted in high-security Tier 3 data center by Venture Tech
  - Data center for uninterrupted service

LegalServer

LegalServer

- Customized case management system for civil legal aids, public defenders, and cities to streamline cases
  - Implemented 350 times since 2002
  - Clients include Legal Aid Chicago, Colorado Legal Services, Legal Aid Bureau, etc.

Key Features

- Client intake and qualification
  - Tools to quickly determine client qualification
  - Centralized client conflict searches
  - Help text to guide a user through the process
- Reports and Grants Management
  - Generate accurate metrics with built-in reporting
  - Easily exported to third party data visualization using LegalServer Reports API
- Exploring interrelated data between cases
- Pro bono management
  - Time-saving tools with custom LegalServer
- Add-on modules
  - SMS texting (Twilio), Multiple Language, e-Case Transfer, Geographic Info System, Dropbox Integration, and more

How it's built

- Cloud hosted platform
  - Offers online application to public with separate cloud-based app for legal aids
- SaaS, web-based

Legal Files

Legal Files

- Case management system supporting legal services, government agencies, and law firms
- Case Management for Advocates
  - Created for legal services programs
  - Meeting reporting requirements
  - Ability to track community education and outreach

Key Features

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  - Tools to quickly determine client qualification
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JusticeServer

JusticeServer

- Case management system for legal services with a focus on LSC's guidelines
- Determines case qualification and
- Customizable case outcome monitoring
- Centralized location for pro bono attorneys to volunteer
  - View by state, jurisdiction, specific organization, etc.

Key Features

- Client intake and qualification
  - Tools to quickly determine client qualification
  - Centralized client conflict searches
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Pika CMS

<u>Pika CMS</u>

- Case management system made for legal services
- Single, centralized system
  - Available on premises and
- Outcome Module added

Key Features

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