Automated Case and Attorney Allocation System for a Large Non-profit

Client Business Description

Our client is a **non-profit law firm** that provides free legal services to lower-income residents of a city in the US State of California. The firm is funded by the government (City, County, State, and Federal), as well as endowments and charities.

They strengthen the community by fighting for justice. They provide low-income clients with **free civil legal assistance**, including legal advice and counsel, effective referrals, and legal representation.

The lawyers maintain expertise by specializing in only one area of practice. They are committed to staying up to date on all the latest laws and approaches to their clients' problems. Clients do not have to travel to the office where the attorney or advocate works but may use any of their three office locations to speak with their lawyer. Video conferencing can be used for a client discussion when needed.

Situation

The client had a huge database of attorneys, who voluntarily applied for working on cases for lower-income groups. The client receives several cases every day, so maintaining a database of cases as well as attorneys was cumbersome, manual work. Another challenge was searching for suitable attorneys from the huge database as per the new case. They wanted a suitable system to overcome these challenges.

Automated email notifications to the selected attorney were also part of the workflow. In addition to this, after the case was assigned to an attorney, documents were required to be shared securely with him or her on a common platform. Another crucial need was making data easily searchable. They had a specific workflow for this case and attorney management process, but the need of the hour was to automate and make this digitized.

Our Solution

The client commissioned Beyond Key to write a SharePoint-based software that could help the legal aid NPO to manage data lists, provide a seamless document management system, send email notifications, and provide an external platform for attorneys to collaborate on case details within user access permissions.

Their case data was updated on the local SQL server, so it was also important to integrate the SharePoint system with their local server and fetch new case data from the server in a synchronized manner.

Beyond Key SharePoint programmers developed an intuitive SharePoint tool for the client that could perform the following important functions:

We completed SQL server integration to automate the process for getting new case information from the SQL Server.

The system could filter specific attorneys as per the case qualification and give suggestions to the admin to send the invitation.

Built an automated system for sending text messages/alerts to all the attorneys selected for a case and allow him or her to choose his or her interest in the case.
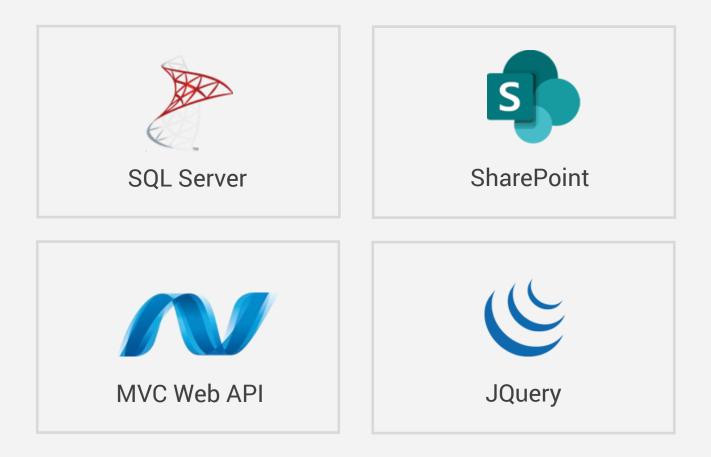
Each case has its own case site where complete case information is saved and can be shared with an attorney as an external user.
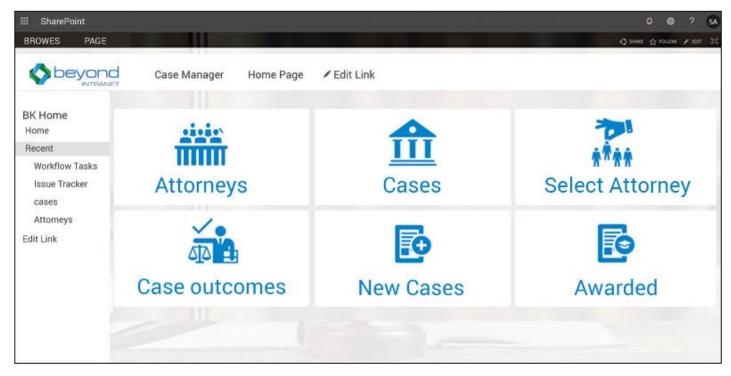
Provide a daily summary report to the admin with details about the number of open cases and available attorney details.

Technology Used

SQL Server

SharePoint

MVC Web API

JQuery

Results

With the implementation of the SharePoint-based case and attorney management system, the NPO could easily automate their current procedure, thus simplifying it and improving greatly on time and efforts.

- Increased efficiency with the custom workflow

- Excellent document management system for each case and attorney

- Improved efficiency in allotting new cases to the suitable attorney and sending them email notifications

- Reduced paperwork in managing cases and thus reduced chances of errors

- Reduced case allocation time brought efficiency in attorney time occupancy thus bringing down overall case resolution time

- Advanced level of security on usage and sharing of case information with an external party

- Admin gets automated daily case summary report

- Seamless data mapping from SQL to SharePoint improves case data collection procedure

- Overall saved on time and improved cost-efficiency

Landing Page