



Legis General Practice Case Management

The Legis General Practice Case Management system incorporates all the best features of the more specialist applications available in Legis, but incorporated into one single application. The system is designed to support practices, where fee earners may operate over numerous disciplines, and do not wish to log into several different systems. As with our specialist applications, the feature rich interfaces go far beyond those offered by our competitors. The General Practice system is capable of supporting multiple practice areas including, but not limited to, PI, Wills/Probate, Family, Conveyancing, Employment Law and General Litigation.



"Having made the decision to upgrade from the earlier Legis system, LegisSQL from Legis Systems has proved to be a major step forward. We reviewed a variety of competing products before making the final decision, but considered that the additional flexibility and user friendly nature of the product, together with its continuous development would benefit the firm, its staff and clientele best."

Brian Whitfield Partner, Whitfield Solicitors

Matter Inception

A fast and effortless inception process allows you to specify what type of matter you will be running. You can enter as much or as little information as you have available. Changing or adding to this data at any future point is simple and allows rapid customisation to meet your client's requirements, while automatic checks reduce or eliminate costly mistakes.

Matter Details

The Matter Details screen shows the relevant parties attached for a particular matter. Data stored behind the details button will be specific to the type of matter that you are in. For example, if you have specified the matter is an RTA matter the following screen is displayed.

Matter Details

OK Cancel Help

RTA Information

Client Vehicle Details

Vehicle Type (please select) Make

Insurance Type (please select) Model

Registration

Other Party Vehicle Details

Vehicle Type (please select) Make

Insurance Type (please select) Model

Registration

Accident Circumstances

Location Time (e.g. 19:30)

Police Attended P.C. Name

Police Ref. P.C. Number

Help

Legis not only supplies a comprehensive on-line context sensitive help system, but can be easily extended to include guidance on legal processes, in house policies and procedures for training new staff, reducing training overhead.

Disbursements and Fees

Full tracking of all disbursements and fees is a major feature. Individual entries can be flagged as 'Include in next bill', 'Billed' or 'Written off'. Financial control is maintained through special billing processes enabling you to keep an accurate track of the financial position of the matter.

Disbursements and Fees

OK Cancel Help

Financial Details for Disbursements and Fees: 17/07/2009

No.	Date	Type	Description	VAT Rate	Total (inc VAT)	Notes
1	01/07/2009	FEE	Our Standard Fees-Our Standard Fees	15.00	632.50	Billed: 1234
2	17/07/2009	DIS	Court Fee - presenting first petition	0.00	300.00	Include in next bill
0				0.00	0.00	

Total (including VAT) 932.50

Add Item Amend Item Delete/Undelete Item

If setting billing status To (select if setting bill status) Set Item Billing Status

Print to Excel Bill

All information can be output in a report to Excel or Word.

Application Integration

Legis is integrated with Outlook. E-mails are stored within the matter together with any attachments. SMS messages can be generated and sent manually or automatically from the running of specific tasks. Faxes can be sent via Rightfax or ZetaFax.

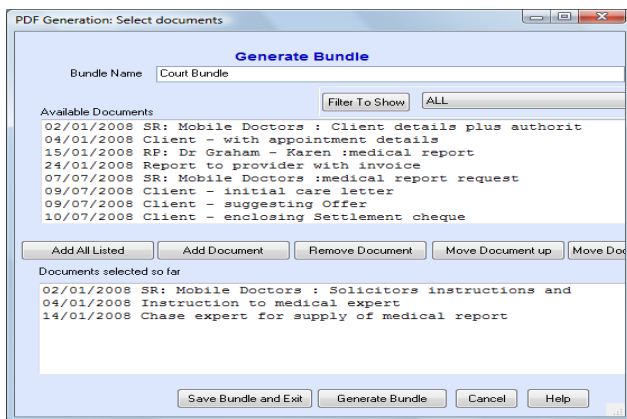
Laserforms are automatically populated with data. Also supports viewing of Oyez forms. Completed forms are stored for rapid future retrieval and adjustment.

Emails, SMS messages, faxes and Laserforms are all stored behind the Legis diary history, for instant perusal.



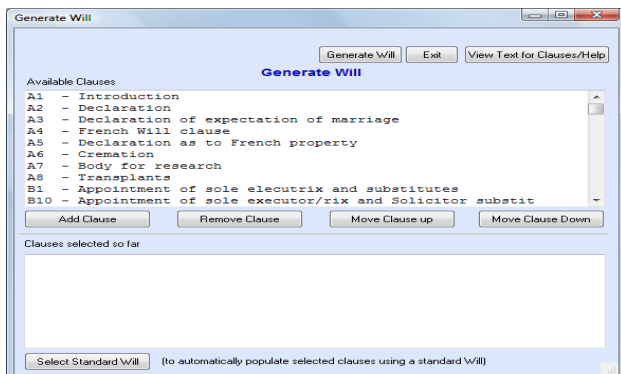
Trial Bundles

Produce Trial bundles effortlessly, by selecting previously generated documents from behind the Legis diary history. Once complete, the Trial bundle is saved behind the diary. The bundle can then be printed or e-mailed as appropriate.



Wills Generator

The Wills generator tool allows Wills to be produced in a fraction of the time it would normally take. It allows the user to view and select appropriate clauses from a selection list (see below). Once the clauses are selected the user can reorganise the clauses as required.



Once generated, the Will is loaded into Word, where further amendments, including additional clauses may be selected and inserted.

HIP Production

HIP documents can be scanned into the diary history and simply merged with any other stored documents, to create a full HIP PDF file, comprising the sale statement, the HIP index and the HIP itself.

The generated HIP file will be automatically stored behind the diary history.

This is an out of the box feature, requiring no additional outlay other than a network scanner.

Management Reporting

Legis has a number of standard reports available.

External reporting can keep clients/providers up to date on a daily basis as to the matters in progress and the key stage that they have reached. Internal reporting allows for monitoring of caseloads, reviewing time reports for each fee earner and monitoring disbursements, to name just a few. Additional reports can be customised with ease, to meet individual requirements. Reports can be printed, sent to Word, Excel, e-mail, etc. as required.

Documents and Scanning

Document management and production under Legis is easy. Document content can be built intelligently by rules fed into the system. The resultant output can be printed, e-mailed, faxed etc. Even grouped together and generated in one single process. You can also decide if you want all your incoming documents, whether by letter, e-mail, or fax, stored within Legis. Incoming post can be scanned and attached to a matter, accessible through the diary history, and it can generate a notification task for the fee earner.

Document Management Utility

To further assist in locating critical documents, the Legis Document Management Utility can index all documents. This powerful feature allows you to search, using multiple search criteria, the entire Legis database for documents. With this facility, single/multiple documents can be selected then printed or copied to other secure locations.

Time Recording

Legis has a powerful built-in ability to allocate time to all fee earners working on their matters. Specific charge rates may be dependent on fee earner experience/type of claim. Legis can integrate with Accounts systems, if required.

What else can we offer to assist you?

In addition to delivering the best and most flexible Case Management tool on the market, KsysLegal also offer business analysis. Experience and expertise built up over many years, working both in and with Law practises, allows us to deliver comprehensive solutions that return substantial benefits to your business. We also offer extensive training to both IT professionals and end users, as well as bespoke development.



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