

PROLAW CASE STUDY
SACRAMENTO COUNTY
COUNSEL

CONQUERING CHAOS IN A GOVERNMENT LEGAL
OFFICE WITH PROLAW



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INNOVATIVE CASE MANAGEMENT SOLUTION

Sacramento County Counsel acts as general legal counsel not only to the county but also its officers and related constituent government entities and other, independent local agencies. In prosecuting and defending cases, they cover a range of areas, including the prosecution of major caseloads of juvenile dependency, conservatorships and probate, labor relations, grievance arbitration and related litigation, personnel discipline, zoning, building, and other code enforcement. They defend litigation brought against actions of the Board of Supervisors, including, but not limited to, actions related to the county's budget, programs, and county land use regulations.

Their attorneys provide general legal advice and prepare the legal instruments by which the county transacts business, including ordinances, resolutions, and contracts. With these many responsibilities, the office needs a business management solution flexible enough to accommodate the varying needs of the attorneys and intuitive enough to keep the documents and docketing accessible at a moment's notice.

Since 2010, Sacramento County Counsel has been utilizing ProLaw®—the comprehensive business management solution built from the ground up—for their 51 attorneys and 80 total employees. It was initially selected for front office purposes to track cases, documents, docketing, and file management, but usage has since been ramped up and expanded to include reporting functionality, and it continues to expand.

“The best thing about ProLaw right now is being able to find everything...and everything's in a place where it should be.”

Julie Inclan
Administrative Services Officer, Sacramento County Counsel

ProLaw is an integrated software solution designed to automate the practice and manage the business of law. Built entirely on Microsoft® .NET, ProLaw combines case and matter management as well as time entry, billing, expense tracking, and accounting capabilities within a single integrated platform.

Before the team adopted ProLaw, they would use a shared drive to store their documents, often in an extremely haphazard and disorganized way. The physical files were in much the same state. “We had files stacked in the attorneys' offices,” remembers Julie Inclan, administrative services officer at Sacramento County Counsel. “You couldn't find anything.”

ProLaw was able to change this by streamlining data entry through a single, intuitive, and easy-to-use interface. Now, all files and documents, even items not available in a hard file, can be accessed electronically.

FLEXIBILITY IS THE KEY

The system tracks all cases from the moment they are assigned, with important case information and documents automatically replicated and available to all staff almost instantly. This makes it easy for teams to collaborate and access the entirety of a department's knowledge of case work. “You don't have to ask five different people before you can find a piece of paper,” says Inclan.

The advanced docketing features in ProLaw are viewed as one of the most critical parts of the solution, according to Inclan. “We've made a lot of custom docket events for probate and juvenile dependency so that we can schedule hearings, and the attorneys are reminded of those.” The system tracks all case updates from the moment a case is assigned, from a short phone call to the complex series of related events leading up to a trial, and provides attorneys with the critical, up-to-the-minute status of all their cases. It translates important milestones and tracks court rules, automatically managing half a million events a year.

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BUSINESS CHALLENGES

The counsel needed a business management solution that could keep track of both files and attorneys.

WHY PROLAW?

Built from the ground-up on a single database, ProLaw combines case and matter management as well as time entry, billing, expense tracking, and accounting capabilities within a single integrated solution.

BENEFITS

- Flexible, intuitive user interface
- Customization at every point
- Supports the transition to paperless
- Extensive docketing and calendaring capabilities

“Everyone in the office can look for anything they need. If someone needs to take over a case for someone else, its right there for them.”

Julie Inclan

Administrative Services Officer, Sacramento County Counsel

Before ProLaw, hearings would regularly be scheduled on only the responsible attorney’s calendar. “No one else knew about it,” says Inclan. “We wouldn’t know what any of the attorneys were doing.” This would understandably cause difficulties when managing attorney and staff absences. The scheduling system on ProLaw ensures that all calendar information is centralized, and everybody has access. It even allows users to link everyone involved with each docket event and ensures that they all receive the appropriate event reminders.

Beyond the scheduling and practice management benefits, Inclan found that the best feature was the search function to locate documents and, specifically, the ability to filter the results. The intuitive features of ProLaw simplify and streamline the work of attorneys and staff for government agencies, giving the attorney instant access to all relevant information. They are now able to answer any queries and advise their clients on how best to achieve desired outcomes, with a reaction time that has now decreased from a matter of hours to just seconds in some cases.

Another significant benefit is the reporting function. The sophisticated financial reporting tools can be used to easily measure lawyer efficiency and overall firm performance. Information can be drilled down in a variety of ways, such as hours generated by a timekeeper in a single day, week, or month.

The office of a county counsel can be a busy and complicated place, with many different kinds of case work occurring. For example, Inclan says, “We have about three to five thousand files in our juvenile dependency section, and they were constantly getting lost,” a state of affairs

that simply could not continue. The files can now be taken out, tracked, and scanned back into the system, providing much needed organization to a department responsible for ensuring the safety and wellbeing of children.

The office has now also begun to scan all closed files and dispose of the hard copies, with a plan to eventually go paperless. Without the flexible and centralized capabilities of ProLaw—the only management software that integrates with Microsoft Outlook® and Word—this would simply not be possible. Attorneys now have all files and calendars available at their fingertips, leading to a much more efficient working process.

UNLOCKING THE SYSTEM’S FULL POTENTIAL

As for the future, Inclan believes there are still a number of ways ProLaw can be further utilized to increase operational benefits. “Our plan with ProLaw is to continue to expand on what we’re implementing,” she says, “including more reports and automated reports, queries, document templates, and adding administrative and budgeting information into ProLaw.”

For those who can sometimes have a difficult time adapting new technology, ProLaw is designed to make it easy for users to manage all files and data simply and intuitively. The plan for Sacramento County Counsel is to eventually move away from a shared drive and have all attorneys use ProLaw, finally ending the reliance on old and inefficient technology.

“Now that we know what we want, we can add the features that we know we need,” says Inclan. Any changes Sacramento County Counsel wants to make are supported by the built-in adaptability of the software. It is uniquely designed to support further growth, enabling clients to make many changes in-house and providing access to an established community of ProLaw users to which they can turn to when they need support.

Now Inclan is recommending it to other government offices. “The best thing about ProLaw right now is being able to find everything, and everything’s in a place where it should be,” she said. “I think each year gets better and better.”

For more information about ProLaw, please call **(800) 977-6529** or visit **www.prolaw.com**.

