



RUBIX PRACTICE MANAGER – THE FIRST CASE MANAGEMENT SYSTEM OF ITS KIND

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Essential Risk & Business Insight for Law Firms

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Our guest author Martyn Paddon, Managing Director of Rubix Technology, highlights the virtue of having a Case Management System designed specifically for Law Firms.

Rubix Practice Manager (RPM) is the first case management system of its kind for law firms.

Recognising that every law firm approaches technology and case managements systems differently Rubix have delivered a case management solution that operates at a level which every law firm needs to manage its Practice effectively.

It is a revolutionary step that provides law firms with a software solution that delivers on core needs and provides flexibility for future development.

RPM is powered by Visualfiles widely regarded as the UK's number one Case Management provider but designed by Rubix.

We understand law firms and how they are managed and we understand the unique set of challenges that law firms faces in running their business. Law firms are a complex highly regulated environment and the chosen systems need to respect this and operate within this framework.

RPM is a cost effective case management tool that is simple to use and effective across all departments in a law firm and it interfaces seamlessly into a range of accounts packages.



The Challenge

The challenge for Rubix was to develop a case management system that recognises that most law firms operate differently and acknowledge that legal service provision will differ from the different case types.

Too often law firms will settle for a system which delivers on most but not all of their needs and as a consequence the chosen system is not universally accepted across the firm.

The system had to be easy to use, intuitive and enable bespoke functionality to be built into each firm to recognise their own uniqueness. The system had to be robust and operate across multiple services and multiple users with different needs but recognise a commonality of system requirements and functionality.

RPM delivers a customisable and expandable system that truly works for all members of a law firm regardless of position or legal service being offered.

The Benefits

Case Management Technology is well established in the legal industry. However, understand the technology and the needs of each firm are critical to choosing the right system.

RPM has been built to deliver a platform for **all** firms of all sizes providing a core level of functionality that runs through the heart of good law firm management and practice to include a regulatory compliance platform.

The system is fully customisable and can, if needed, be developed to include work flow management and introduce other efficiency based technology as listed below under optional modules and other services.

However, RPM recognises that whilst every firm needs a core system to deliver common requirements, not every firm needs the technological advancement to drive efficiency and deliver workflow technology to manage and supervise junior staff.



The key benefits of RPM are:

- A single system that operates across the entire firm
- A system that can expand or contract with the firm
- Simple to operate and navigate for users of all ability
- Fully integrated into Microsoft products
- A case management solution that provides functionality across all staff and all legal services
- A time recording platform
- Performance and productivity enhancement through utilisation of case management functionality
- Visibility and transparency for managers and owners
- Bespoke documents suites attached to work types enabling template letters to be generated
- A diary system enabling case handlers and supervisors to manage a portfolio of work effectively.
- A file history that enables all users of the system to access and view correspondence relevant to each case
- Easy to use case creation that provides a consistent method to open and store files on line
- Management Information suite bespoke to the firm to manage tasks, staff and clients
- Integration into chosen accounts package to ensure 'double key' entries are unnecessary



The key benefits of RPM are (cont.)

- A regulatory platform that includes
 - Case management
 - MLRO standard checks ensuring minimum standard of MLRO by matter type and result storage
 - COLP register and process for notifying, recording and managing potential breaches
 - COFA register and process for notifying, recording and managing potential breaches
 - Complaint register to record, monitor and manage breaches
 - Audit and risk assessment system for undertaking and recording audit and risk assessment outcomes
 - Regulatory report suite
- User profiles enabling restrictions of activity
- Ability to develop workflow if needed
- Ability to add other products as needed
- Supported by a world leading legal software brand (Lexis Nexis)

RPM is a system designed to work for both the firm and its staff providing a one stop solution for all case management needs thereby saving time, expense and resource in managing the system and providing legal services.



System Specification

RPM delivers the following core functionality for its users

Matter Management – Ability to open a file that will integrate with your accounts package, store customer information and set diary dates for case reviews and matter tracking. Dependent on case type the ability to access documentation and precedents relevant to the case.

COLP and COFA Register – Record online any breaches of potential breaches of the Solicitors Accounts Rules and Solicitors Code of Conduct. Record the breach, action taken and outcome. Run data from the system for monitoring and reporting purposes.

MLRO Procedures – Set the procedure for Anti money laundering within the firm. Have a standardised minimum expectation of checks to undertake across the firm or by department and in built escalation procedures.

Complaint Register – Ability to record a complaint from within a case, identify action to be taken, record the outcome of the complaint and consequences such as compensatory payment or fine. Ability to run management information and produce information on complaints for analysis and action.

Auditing and Risk Profiling – Ability to undertake a case and risk review from within the case and record the outcome of the review within the case. Also enable actions from any review to be taken and change the risk rating of the case with consequential action such as escalation or blocking further spend on items such as disbursements.

Case History - Each file will have a case history which will save all letters, emails or notes to the history. This will include incoming post if required and the firm has the technical capability to do so.

Letter, memo and email generation – Ability to generate letters and emails from within a case which will automatically post the correspondence to the case history.



System Specification (cont.)

Accounts Interface – The system will fully interface with the accounts functionality enabling the case management system and accounts package to sync at all times with information always up to date and correct.

Time Recording & Fees – Full time recording functionality enabling case handlers to record time spent per matter. The system also enables the entering of a fixed or capped fee which, when reached can alert the case handler and supervisor that the fee has been reached or exceeded enabling action to be taken.

Profiles – Each user of the system will have a profile which can restrict actions they can and cannot take on the system.

E-signing – Once click document signing module enabling clients and other parties to receive documents via secure email and return signed documents that are integrated into the case management system.

Optional Modules

The following additional functionality can be provided as part of the system: -

MailMinder – Install of Mail Minder which is an email monitoring and management tool that interfaces between Microsoft exchange and [RPM](#).

Address Finder – The ability to find accurate address information by simply entering the postcode and house number to populate the address accurately.

SMS Module – Ability to send an SMS to anyone within your RPM system*



Other Services

RPM can be extended and advanced to include the following: -

Workflows – Ability for the system to develop customisable workflows which can be designed to the exact needs of the firm. Any work type has the potential to have a work flow system built for it.

Client Tracking - Provision of an online client portal enabling clients to securely log onto their case to review, download and print correspondence and documents, leave a message for their case handler and review case progression.

Payment required and authorisation - Additional ability to request client and office payments from within the case management system with limits imposed against relevant users and a full audit trail. This updates the accounts system and provides a secure payment request and authorisation system.

Customisation – The system is capable of customisation to reflect the individuality of a law firm or the departments operating within the firm.

Management Information Dashboard – Using the power of Rubix RPM and SQL Server users can access on demand reporting for any information within your RPM system.

Support

The RPM Matter Management system is fully supported by Rubix Technology meaning that you have unlimited support for the software. Support is provided between 8am and 6pm, Monday to Friday and support can be obtained by

- Logging onto our secure portal
- Email
- Telephone



About The Author

Having worked in the Insurance and Legal sector for a number of years, Martyn Paddon is now the co-founder and managing director of Rubix Technology Ltd. Rubix specialise in the provision of IT solutions, products, software and consultancy for the legal sector.



For further information,
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