



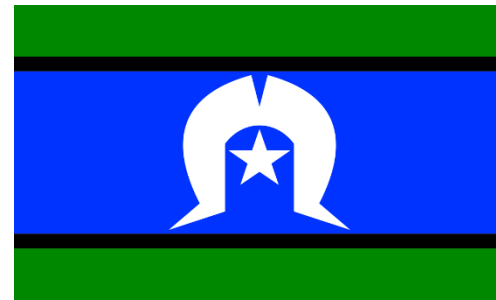
TOWNSVILLE
COMMUNITY
LAW

An introduction to using CLASS as a practice management tool

Michael Murray
Townsville Community Law Inc.

Acknowledgement of Country

Townsville Community Law acknowledges the traditional custodians of the land on which we meet today. We pay respect to Elders past, present and emerging for they hold the memories, the tradition, the culture and hopes of Aboriginal and Torres Strait Islander peoples across the nation. We extend our respect to the Aboriginal and Torres Strait Islander people who are present today.



Session Overview – what we hope to achieve

- Overview of presentation
- Your thoughts on CLASS?
- Townsville Community Law Inc. & the paper-lite office project
- Project timeline
- Townsville Community Law Inc. milestones and to do list
- Overview of the utility of CLASS with examples
- Your thoughts on CLASS (now)?
- Questions



Session Overview – what we are not going to do

- Discuss data definitions in any detail
- Explore in detail any complex functions of CLASS

Your thoughts on CLASS?

Conflict Check

New Intake

Search Clients

Non-Clients

Search Services

Triage

Search Critical Dates

My Critical Dates

My Services

CLASS

Community

Reports & Accountability

Tools

System Settings

Message Board

Message Board

WELCOME TO CLASS

[CLASS Online Guide](#) | [Training](#) | [Getting Help](#) | [CLASS News](#)

CLASS GEOLOCATION RE-TAGGING: PROGRESS REPORT

3/7/2020

You may have seen in CLASS News in April/May mention that we would be updating our geolocation boundaries in CLASS, which might result in extended periods where reporting by administrative boundaries may not be reliable.

We are pleased to confirm that all addresses for services in the 2019/20 Financial Year have been processed and all of your new services are being processed as normal.

In order to ensure adequate resources are available for EOFY reporting, we have had to pause the processing of older addresses - this means that reports on administrative boundaries for periods prior to 1 July 2019 may not give the correct results for now. The pause will commence outside of ours this evening (3 July 2020) and we will resume processing this on 15 August once reporting demands for the last financial year calm down.

Reports not grouped by any administrative boundaries will still work as normal.

If you have any questions feel free to contact the helpdesk via icthelp@clcs.org.au

IMPROVED HELPDESK PORTAL AND NEW EMAIL ADDRESS

30/6/2020

Please bookmark new portal link: <https://jira.classhelpdesk.org.au/servicedesk/customer/portal/9>

Please replace Helpdesk email address: icthelp@clcs.org.au

We are excited to deploy a more streamlined helpdesk from 1 July 2020.

We're still using JIRA so no need for new sign ups or registrations.

Our new and improved portal is above, please bookmark this. We encourage you to request help through the portal for a more efficient experience and easier sharing of screenshots and documents with you.

For those who still want a quick way to get in touch with us, our new email is icthelp@clcs.org.au. The old email address will be disabled at the end of the month.

Feel free to raise any questions about CLASS or the system in general through the above channels. We look forward to hearing about your new experience!

IMP Cyber Security

Home

Help

Michael Murray (Townsville Comm..)

Close

PINNED POST: DOWNLOAD TOWNSVILLE COMMUNITY LAW FORMS BELOW:



Electronic Document Management Guide
VERSION 7



Electronic Document Management Guide
VERSION 7



PDF



DOCX



Client Intake Form



THESE ARE THE MOST UP TO DATE VERSIONS, AND WILL BE UPDATED AS NECESSARY. PLEASE DO NOT REFER TO OLDER VERSIONS SENT VIA EMAIL.

YOU WILL NEED TO CLICK "... (top right hand corner) then "DOWNLOAD" WHICH WILL AUTO-OPEN THE DOCUMENT IN WORD. SAVE IT YOUR "000. DATA ENTRY FOR CLASS" FOLDER TO EDIT/FILL IN THE DOCUMENT

Your thoughts on CLASS?

- How would you currently rate CLASS as a practice management tool?
- Very good
- Good
- Not Bad
- Bad
- The Worst



Your thoughts on CLASS?

- Are you currently using CLASS as a practice management tool?
- Yes
- No, but I would like to



Your thoughts on CLASS?

- In your centre, do all staff have access to most of the services and the utilities of CLASS?
- For example: *conflict checking, triaging, creating services, uploading documents, report building etc.*
- Yes
- No, but I would like to



Your thoughts on CLASS?

- Do you currently use CLASS in some capacity to:
 - Draft & record file notes?
 - Store client documents, including documents received from the client and documents you generate for the client?
 - Set reminders, such as limitation periods, court attendance or general 'bring-ups' for client services?
- Yes
- No
- Partly
- Did you know CLASS could do all of that?
 - Yes
 - No

Townsville Community Law Inc. & The Paper-lite Office Project

- What we were doing (pre-project)



TOWNSVILLE
COMMUNITY LAW

Project timeline

- The beginning of the project & setting a timeline

Project timeline

- What we wanted to achieve:
 - A paper-lite office
 - Maintain or increase staff productivity
 - Increase flexibility of staff
 - Support and train staff to ensure they are comfortable with the transition
 - Invest in suitable technology
 - Save \$\$\$
 - Comply with relevant risk management guides & strategies
 - A common sense and easy approach to document management
 - Continue to provide excellent service to our clients and the community

Project timeline – Phase 1

- Learning and testing phase



Project timeline – Phase 2

- Electronic Document Management Guide (“EDM Guide”)



Electronic Document Management Guide VERSION 7

Table of Contents	
Electronic Document Management Guide	1
Guiding principles	3
Client intake forms	4
In person – new clients	4
Not in person – new clients	4
In person and not in person – existing clients	5
Case study consent, privacy policy & file destruction consent	6
Client services guide – an overview	7
Client services guide – new services for triaged clients	8
Before your appointment	8
During your appointment	8
After your appointment (finalising the service record)	9
After your appointment (data entry and complying with the Risk Management Guide)	10
Other notes	11
Client services guide – new services for existing clients	12
Client services guide – open services	14
Recording file notes to the service record	14
Recording documents to the service record	14
Closing the service	14
Client services guide – using reminders	16
Client services guide – recording court dates	19
Client services guide – saving documents in CLASS	20
File type	20
Naming documents	20
Storing documents in the interim	21
Client services guide – client agreements and retainers	22
Client services guide – data entry templates	23
Data Entry Template – Legal Advice	23
Discreet non-legal	23
Data Entry Template – Legal Task	23
Data Entry Template – New Service	24
Data Entry Template – Close Service	24
Client services guide – no shows	26
Client services guide – Principal Solicitor reviews for closed services (final service checking)	27
Client services guide – Principal Solicitor reviews for open services	28
Client services guide – conflict calling	30
Non-Casework Projects	32

Client services guide – new services for triaged clients

New services for triaged clients are required generally when a new client is booked in to see a staff member.

New clients should always be triaged in CLASS. If new clients are not triaged in CLASS, you are required to raise this with the person who booked the appointment, and have a triage created prior to your appointment.

This section is broken down into the phases of your interaction with the client, *before your appointment, during your appointment, after your appointment (finalising the service record) and after your appointment (data entry and complying with the Risk Management Guide)*, with some additional notes set out at the end.

Before your appointment

1. Navigate to the **TRIAGE** tab in CLASS.
2. Find the client you are seeing by searching for the client’s surname under the **LAST NAME** text box in CLASS.
3. Click on the client’s **TRIAGE SERVICE ID** in the **SERVICE ID** section.
4. This will open up the client’s triaged service.

During your appointment

5. You must ensure the client intake form is completed per the client intake form section of the Guide.
6. During your appointment you will be in the client’s triaged service. Navigate to the **ACTIONS** tab.

Client services guide – saving documents in CLASS

The process regarding saving documents is set out above. It is vital that there is consistency across staff members in terms of how documents are saved. Instructions are set out below under the headings, *File type, Naming documents and Storing documents in the interim*.

You must follow these instructions when saving documents in CLASS.

File type

Final documents must be uploaded as a PDF to CLASS (emails, final submissions, applications, court documents, letters etc.).

Drafts can be uploaded in word format so they can be amended at a later stage. If you are uploading a draft, the word ‘draft’ must be included in the file name as set out below.

Naming documents

Documents must be named as follows: yearmonthday ClientSurname Description.

For example:

- 20190618 Doe Email to Client
- 20190618 Doe Email to AAT
- 20190618 Doe AAT Submissions (draft)
- 20190618 Doe Client Intake Form

The documents on the file can then be accessed in reverse chronological order, similar to how a paper file was traditionally stored.

Project timeline – Phase 3

- (Intensive) staff training, including:
 - CLASS training
 - EDM training
 - General IT training
 - Working in a paper-lite office

Project timeline – Phase 4

- Gradual implementation of the EDM Guide across the office

Project timeline – Phase 5

- Continued training and regular evaluation

Milestones

- **February 2019** – One lawyer (me) had moved to using CLASS as a practice management tool for new legal advice only
- **March 2019** – One lawyer using CLASS as a practice management tool for all new service types
- **March 2019** – Began to transition other staff one-by-one
- **June 2019** – All staff had been transitioned for all new service types except community projects
- **July 2019** – All new community projects had transitioned
- **September 2019** – Zero active paper files or services
- **November 2019** – Court compatibility
- **February / March 2020** – COVID-19

To do

- Volunteer services
- University Clinics

An overview of CLASS as a practice management software

- What is practice management software
- How does CLASS compare?



What can CLASS do?

- Host forms (client intake forms, precedents etc.) via the Message Board
- Communicate messages to staff via the Message Board;
- Record file notes
- Record limitation periods/court dates/important dates and save them to both CLASS and your Outlook Calendar
- Record 'bring ups' and save them to both CLASS and your Outlook Calendar
- Save documents to a service

John Doe – disputing a COVID-19 fine

- We will look at:
 - An initial legal advice
 - A subsequent representation service



Legal advice



Data Entry for
CLASS



Representation service



Data Entry for
CLASS





Data Entry for
CLASS



Closing remarks

- Invest in:
 - Time
 - Technology
 - Training
- Don't be afraid to take risks
- Be agile, receptive and encourage feedback
- Be prepared for a 'cultural change'
- Do what works for your centre – we all work a little differently

Closing poll

- Would you feel more comfortable using CLASS as a practice management tool after this webinar?
- Yes
- No



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Questions?

Evaluation!

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