Community Legal Centres Queensland
**Community Legal Centres Queensland Inc.**
PO Box 12102, George St, Brisbane QLD 4003
Tel: 07 3392 0092 ABN 71 907 449 543
admin@communitylegalqld.org.au
**www.communitylegalqld.org.au**

# CLCQ webinar: 16 July 2020

# An introduction to using CLASS as a practice management tool

### Questions & Answers

**Michael Murray, Townsville Community Law**

1. **Last time we asked, CLCA wasn't able to confirm we would meet RMG requirements if we went fully digital. Can you share your advice about that?**

I understand CLCA is still working through this process. We made enquiries with various stakeholders and were able to satisfy ourselves that the methods that we were using satisfied the RMG requirements. If anyone needs further information on this perhaps shoot me an email and I can look at putting together an email in more detail for you.

2. **What are the benefits of emailing the admin officer to enter the service / close the case, rather than just doing this yourself in the CLASS service?**

For us, data integrity & consistency. It can be done by the caseworker converting the triage to an advice etc. service themselves. We anticipate we will move to that in the near future when we are confident all who are entering data can do it consistently.

3. **Could you skip the intake form and do intake direct to CLASS? or does it contain additional information?**

Yes, easily! We actually have switched over to that this week so no longer have physical intake forms for all services. You can easily add additional information into the intake process in CLASS by customising the screens.

4. **Can you use/merge your own intake form, or can you only use the client/service tabs to put in information that can be used to run reports?**

I am not sure I understand this question fully. For the physical intake forms, the information/data collected in that is put into CLASS by an administrative officer at the time the service is created so reports can be run off that. As we have now removed physical intake forms it is just directly put into CLASS and can be used to run reports – hope that answers it!

5. **Can you get a report printed for a client? Showing the different actions?**

Yes, easily, you can save and print a PDF report of all different actions including any text typed in with that action (for instance, your file notes etc.).

**Community Legal Centres Queensland**

6. **Did you consider using another tool to save documents, eg file notes, reports etc, like sharepoint, in combination with CLASS as opposed to only using CLASS.**

Yes, we settled on using only CLASS as we did not want parts of client services in different programs. That way, if I am taking over a service from a colleague who may be away or sick, everything I need is in CLASS without having to access their SharePoint etc which usually has personalised duel authentication to access.

7. **Is converting a triage to a court/tribunal service as simple as making the new service and then merging it into the client? We don't currently use triage.**

Yes, and all your actions, documents, notes etc. will carry across to the new service. We use triage as a 'parking lot' before a service is created – that way intake notes or client documents can be stored in anticipation of an appointment.

8. **Do you have any concerns with trusting CLASS to maintain data integrity?**

No, we have had no issues.

9. **How do you deal wtih volunteer solicitors and multiple students using CLASS for recording advices? Do you have separate CLASS logins for them all? Did you do separate training for them?**

We haven't moved these services over to paper-lite yet. We are working towards doing that at the end of the year. I haven't given it a huge amount of thought yet…but my initial thought is individual CLASS logins would be best, and certainly separate training. I do think you could cut the training down to entering things like notes/limitation dates. The whole 'what type of service does this become' may be beyond students/volunteers.

10. **How do you manage with access to documents etc for students/volunteers? We run a student clinic and have clinical legal education students here for a semester 1 day per week. (two days per week and for 2 semesters and graduate placements throughout the year).**

See Q9. If there is an electronic record that exists for a client who may now be seeing a volunteer or student – we will generally do a print out of the actions/client documents (rare that we have to do this).

11. **Do you have a folder for each client that you use while developing documents/letters etc. once settled and signed, do you then delete those files? Does the admin do that or the solicitor?**

Our general rule is that documents and notes must be put in CLASS contemporaneously. For more complicated documents (pleadings etc.) we may work off a folder on our local server but also keep a draft on CLASS if takes, for instance, a few days to finalise. Solicitors are responsible for uploading this type of document.

12. **Capability to edit documents in a live manner (similar to SharePoint). Do documents need to be downloaded, edited, and reuploaded? Does this mean you keep service documents locally until the service is completed and then uploaded to CLASS?**

I think this is answered in Q11. You can't edit in a live manner similar to SharePoint. Would generally work off a local server but keep a draft if it is extending for some time in CLASS.

13. **How do volunteers access your files if they are kept digitally but they do not have CLASS access? Is an admin downloading and printing them for volunteers ahead of sessions/on demand?**

See Q9 & Q10.

14. **Does it save the documents/file notes etc in that one representation file etc once it's finalised or do they just stay on the client record? Just wondering about returning clients where there might be lots of entries or documents to scroll through (which would otherwise be clearly attached to a particular advice/rep in an old fashioned paper file.**

This can be an issue. We will only save to the service record (won't replicate to the client record). We found it best to do it on the service record as (a) it is a service document, not a client document and (b) we have many clients who see us for many different issues – so storing these documents on one client record is problematic and would be painful to review/find the relevant documents.

The only document we saved on the client record would be an intake form (which we've now changed to paperless) or things like client ID.

15. **How do you file evidence? Do Tribunals and Courts accept electronic filing?**

Queensland is about 6 or 7 years behind the progress of other States as far as electronic filing is concerned (last I checked).
We are able to file some initiating proceedings and subsequent applications/evidence etc. electronically depending on the Court or Tribunal. There are some that we still can't so they are printed & filed in person. Best to check with the Court/Tribunal registry directly.
I would say in the work I do, I am able to file about 80% of all court documents electronically.

16. **At what point in the process do you do conflict checking?**

When they make that initial contact. If a conflict is identified the triage is converted as necessary so the conflict will not become a full client and notes are stored in CLASS regarding why it is a conflict, and what the person was told. That way if they call back it will show up in CLASS.

17. **How do you supervise ongoing services and ensure compliance with the Risk Management Guide?**

We have a weekly file review for ongoing services, notes of supervision are stored via an custom action we created on the service.

**18. Do you find that lawyers have come to rely on the reminder/outlook calendar email system? and has that taken over their previous system, ie, files on floor in visual piles, or a notebook?**

Absolutely…there were of course initial issues, but all our staff primarily use CLASS reminders/outlooks (some still keep an individual list of client names who are ongoing services on a legal pad just in case…).

**19. How do you manage conflicts and information barriers for staff in CLASS?**

We generally don't use information barriers. I am not sure if certain services can be excluded from certain staff users – I expect they could be…maybe check with the Help Desk.

**20. If a second person is identified in the appt who does conflict check then?**

Generally the person conducting the appointment should immediately conflict check on CLASS during the appointment, or stop the appointment so it can be checked/dealt with as necessary.