CSnet checklist for community legal services

This checklist has been completed by CSnet to assist Community Legal Services to review the key considerations when selecting a CMS tool that is 'fit for purpose' for their organisation. The checklist sets out a range of information that supports an evaluation of 'right fit' from a values, strategic & operational perspective, key functionality & features, ease of integration across multiple programs, one-off and ongoing costs, support & access to CSnet in-house Australian capacity.

This document uses the format of the CLCA CMS Review Report Tables for ease of comparison between software vendors, services & costs.

Problem definition

What is your overall vision for the CMS tool?
What are your business objectives?
What key outcomes does your chosen CMS tool need to achieve?

CSnet is most likely the 'right fit' for your organisation if …

✓ You are a multi-program multi-funded organisation providing legal advice & social support across a number of social justice programs (eg minimum data sets to report to CLASS, DEX, P2i, PHN etc)

✓ You want to measure client & social 'change over time' through the use of survey instruments & outcomes measurement alongside records of the support you provide & advocacy activities – you want evidence that you are making a difference & to use real time data for learning & improvement of your programs

✓ You don't have a big 'IT department' in-house – you'd like a partnership with an Australian vendor that has in-house on-shore software developers & community services support teams - sector expertise who you can call on when you need help

✓ You want to be part of a community of practice with other organisations & to have a partner who seeks your input to the system development roadmap – you want an allocated key contact who knows what you do, regular support catch ups, community user groups & you want to know that your input is taken into account in the ongoing improvements to the system

✓ You want a partner that is 'values aligned' & sustainable – you align with CSnet as a Benefit Corporation social enterprise, you think that a focus on measuring social & environmental impact makes an organisation stronger & more resilient for the future

✓ You want independent third party certification of the software system's security & privacy controls – CSnet provides that confidence through being a SOC2 certified SaaS with a robust QMS, full suite of insurances including professional indemnity, software product & cyber-

security insurances in place

✓ You want confidence that CSnet will directly upload data to CLASS, DEX, and other integrations like DEX in one streamlined step – in CSnet you have a low-risk single solution, a single contract & can be confident based on history that the integrations work successfully in CSnet (no third party plug-ins or apps that make life more complex).

Functionality

The table below provides a sample of the functionality centres may require. It is not comprehensive. It is important that each centre scope out the functionality that meets its unique needs.

Client management	Client details at a glance; Alerts for high-risk clients; Other parties; Conflict checking; Search; Handle all client data; resolve duplicates; See all matters and services for a Client through a Client History View
Matter and Service management	Matter at a glance – see all services provided as part of a matter; Reminders, alerts on cases, warnings on clients; Record file notes and tasks; Limitation dates; Time tracking; Assign a matter; Search for a service or matter; Review matters for risk management; Archive a matter; Capture client & social outcomes
Referral management	Referral to; Referral from; Track referrals; Internal referrals; Integration from your website 'web form' directly to CSnet to kick start intake & streamline referrals & enquiries
Making appointments	Create and view appointments; View calendar; Send SMS reminders to clients; One-way sync to Outlook
Document management	Documents can be uploaded or linked to the client or 'matter' (activity in CSnet terms); Ease of managing documents across a remote workforce; Drag and drop to upload; Create 'category tags' on documents; Emails are 'cut / paste' into text field to copy into the matter or uploaded as a file, Limited access to download documents
Template management	Access to over 300 standard reports & templates as part of CSnet licence fees CSnet provides configuration support to create additional template documents Reports bring out 'templated fields' in any format required
Staff management	Workload management, monitoring of case loads Allocation & adjustment of staff 'teams' on matters
User management	Creating and modifying users; Password management; User Permissions SSO through integration with Azure Active Directory if requested
User experience	Easy to use & pre-determined workflows 'Record data once – user many times' to reduce duplicate manual data entry & see client journey across all programs of advice /

	casework / support over time Run reports & dashboard displays One-step process for integrations - to send NLAP report to CLASS & to send DSS MDS & SCORES to DEX Responsive user interface supports automatic re-sizing of screen display on PC, laptop, tablet screen
Reporting	Dashboards; Run reports with flexible parameters; Export data to CSV; XML and Excel; Graphs and charts in reports; Limit access to a report by permissions; Run a report in Word, PDF or Excel
Appointment management	SMS reminders; Calendar; One way sync to worker external online calendar; Show up in matter if linked; List views of appointments
Messaging	No integration to send / receive emails into the system at this point in time Integration with 'softphone' system to support automatic search / find clients when call is received (if requested)
Security & insurances including cybersecurity insurance	CSnet is certified under global standards against SOC2 Trust Criteria - security, availability, processing integrity of the systems the service organisation uses to process users' data and the confidentiality and privacy of the information processed by these systems. This gives CSnet organisations annual independent assurance that we have in place best practice cyber security and privacy controls. CSnet certification is audited each year by independent third party auditors to ensure we continue to meet SOC2 standards and improve our systems architecture & protection over time. Australian company Hosted in Australia Full suite of professional indemnity, product services, and cybersecurity insurances
Offline/Mobile phone version	Web App with responsive user interface supports access & use on any PC, laptop, tablet with an internet connection No phone app at this point in time No 'offline data entry' to CSnet to ensure data is saved & accessible in real time
CLE, stakeholder engagement and law reform	Supports all activity & matter types – Client advice & support Groupwork CLE & stakeholder engagement, community activities, law reform Surveys & outcomes measurement

Integration

Integration with MS Office	Integration with one-way appointments sync, SMS messaging No integration with email MS office formats including Word & Excel reports
Integration to CLASS	CSnet has built-in the direct integration to CLASS & has been successfully uploading data directly from CSnet to CLASS each week since September 2021 Validate & correct all errors in near-to-real time to ensure workers can resolve all errors inside CSnet before the files are generated & uploaded accurately each week
Integration to DEX[1]	CSnet has an API link that supports direct integration to DEX & has been successfully uploading data to DEX since 2013 Validate & correct all errors in real time ensures workers can resolve all errors, save inside CSnet & data is uploaded every 10 minutes DEX minimum data sets, partnership approach & SCORE outcomes surveys are all built into CSnet & uploaded
Compatibility with NLADS[2]	NLADS minimum data set & risk management features are all fully built-into CSnet to fully meet compliance requirements

Costs (excl. GST)

Software as a Service	CSnet Fair Commercial and Pricing Policy The approach to ensuring that CSnet is the 'right fit' for the organisation - working together initially under the terms of the Letter of Engagement prior to signing a formal Licence & Hosting Agreement, is unique to CSnet. This forms part of our fair pricing model that includes – • User Licence, Hosting and Integration fees start on go-live, not at project commencement • Fair pricing of professional services rates for implementation and ongoing support through our in-house Australian-based and experienced human services and software development teams. • User numbers can rise and fall vs being locked-in for a set number of users for the full term of the contract • Availability of fair priced mirror site for training and testing • Unlimited attachments and storage with no hidden fees • Support in advance hours as you choose which can be 'put in the bank' to drawn down on and are never "lost".
Third party plugin costs	CSnet does not use any third party plug-ins & there are no hidden

	external costs All features are fully integrated & built-into CSnet, implemented & maintained by CSnet in-house software & implementation team & part of the CSnet licence agreement which covers user licences, annual hosting & integration fees CSnet is 'one contract' with full functionality - one vendor & one system All CLASS, NLAD, DEX funding requirements are fully compliant, recorded in & reported from CSnet
Licence costs	Sliding scale for **Standard user licence fees per year** |	Ex GST / user / yr
5 users	850
6-10 users	803
11-15 users	777
16-20 users	729
21-25 users	681
26 – 30 users	650
31 – 35 users	600
36-40 users	550
41-45 users	527
46-50 users	475
51-100 users	427	
Volunteer costs	**Discount sliding scale for volunteer 'slimline' user**s – to ensure each volunteer has their own 'log in' licence fees are discounted & based on 1/3rd the cost of the standard per user licence fee. CSnet is offering a further discount to the per volunteer rate for CLCs so that the per 'slimline volunteer' rate is based on the total volunteer numbers across all CSnet CLC databases Example – 201 volunteers across all CSnet CLC databases @ $109/volunteer/yr
Training costs	Training is provided by our CSnet in-house support & implementation team as part of one-off implementation costs & intensive support continues for 8-12 weeks after go-live
Support costs	Ongoing support is through monthly free catch ups with an allocated key worker in CSnet. Additional support on request eg extra training, new programs / new reports through CSnet in-house support $124/hr (from 1 July 2024)
Hosting & integration costs	Sliding scale for hosting costs Examples – **Hosting costs** Ongoing Annual hosting fee for up to 10 @ $557/yr Ongoing Annual hosting fee for 11- 50 @ $1,114/yr

	Integration costs (per integration eg CLASS, DEX) Integration maintenance for up to 10 @ $557/yr Ongoing Annual hosting fee for 11- 50 @ $759/yr
Backup and storage costs	Licence & hosting fees include automatic backups every 5 minutes. No additional charge for backups or document / data storage.
Data migration costs	CSnet is very experienced in complex data migrations. CSnet is working with CLCA / CLASS to streamline data migration formats & explore options for bulk document migration. Depending on the scope of the data migration, this may cost between $9-18k Further information will be shared with interested organisations about data migration as we work with CLCA on these options
Customisation costs	'Get going get better' implementation approach supports faster implementations & 'out of the box' minimum data sets for NLAD, DEX and other support programs. Standard features are included for risk management & integration features & reports for CLASS, DEX & other programs. After go-live the first 8-12 weeks of intensive support is included in the implementation costs & covers changes to configuration & support from CSnet
Helpdesk support costs	Additional support-in-advance can be used to cover eg extra training, new program configuration / new reports through CSnet support on request $124/hr (from 1 July 2024)
Optional Inbound Data integration between organisation's website form to CSnet	Implementation of Website Enquiries / Referrals channel (Inbound Data) - Implementation of CSnet enquiry integration channel feature from your organisation's website - to accept external 'enquiries' / 'requests for service' from potential clients & referral agencies using a 'webform' on your organisation website to accept enquiries directly into CSnet and avoid duplicate / manual handling of requests. Implementation fee is based on one form / intake and 4 hours form configuration. Additional and more complex forms can be configured as requested & additional costs estimated.

---

[1] DEX is the tool that some centres are required to use for reporting on DSS funding for social security services and matters.
[2] NLADS is the acronym for National Legal Assistance Data Standards.

Vendor capacity

Can they support your centre and keep the system updated?
Do they have adequate local support?
What is their long-term viability?

Vendor presence in Australia	CSnet is an Australian Company Australian software develop, community services support & implementation team who are all employees of CSnet in Australia
How large is the vendor team?	14 employees and growing
How long has the vendor been operating for?	CSnet has been operating since 2007
Vendor involvement with community legal sector	All QSTARS tenancy advice services across Queensland use CSnet as their case management system. Tenants Qld has been using CSnet since 2016 to support its multi-funded multi-program advice & casework programs, community legal education & worker training programs
Hosting	Australian company Hosted & backed up wholly within Australia
Deployment support	CSnet software development, practice & implementation teams support implementation & go-lives Data migration
Ongoing maintenance	Included in Costs above
Training	Implementation includes 24 hours of user training up to go-live and intensive support & training for 8-12 weeks after go-live
Support	All support staff & development teams in CSnet are in-house employees in Australia. Each organisation has a dedicated sector practice team member and access to the CSnet online support & their own 'queue' when a request for support is lodged.
Contract considerations	CSnet is 'one contract' with full compliance & integration functionality - one vendor & one system. Full suite of professional indemnity, product services, and cybersecurity insurances

Other considerations

Customisation	'Get going get better' implementation approach supports faster implementations & 'out of the box' minimum data sets for NLAD, DEX and other support programs. Standard features are included for risk management & integration features & reports for CLASS, DEX & other programs. After go-live the first 8-12 weeks of intensive support is included in the implementation costs & covers changes to configuration & support from CSnet
Regional and remote (offline operation)	Web App with responsive user interface supports access & use on any PC, laptop, tablet with an internet connection. No phone app at this point in time. No 'offline data entry' to CSnet to ensure data is saved & accessible in real time.
Software requirements	Web App with responsive user interface supports access & use on any PC, laptop, tablet with an internet connection. CSnet will run on a Mac. Google Chrome or Mozilla Firefox is recommended.
Community legal education and law reform	Supports all activity, advice, matters & referral work – Client advice & support Group work CLE & stakeholder engagement, community activities, law reform Worker training & supervision Brief contacts (non-client work) Surveys & outcomes measurement

Background

CSnet is an Australian-based client management and outcomes measurement system developed in 2007 and designed to support community services organisations to collect data, streamline processes, report on services and measure outcomes.

CSnet has offices in Brisbane, Melbourne and Sydney. Development work and all user support is undertaken by the Australian based CSnet in-house software developer and practice & implementation teams. A customer service officer (key practitioner contact) is assigned to each organisation using the software to ensure continuity of service and easy access to support.

Contacts at CSnet

Mandy Doon, mandy.doon@csnet.net.au

Greg Simmons greg.simmons@csnet.net.au

CLC Sector uptake

CSnet is uniquely built for the community services sector. CSnet is used by Queensland community legal centres that have tenancy programs (i.e., Tenants Queensland and its seven metro and regional offices).

CSnet is in discussions with a number of CLCs, is presenting a webinar available through CLCQ on 14 March 2024 & will be present at the CLCQ conference to answer any questions or demo the system.

CSnet is used widely by multi-program multi-funded community services organisations large and small across every state in Australia.

CSnet website has links to Case Studies told in the voices of CSnet organisations about how we work together to meet program compliance data collection requirements & support community services to measure client & social outcomes.

Victorian Aboriginal Child Care Agency

Embedding Indigenous culture and practice in system design

https://csnet.net.au/how-vacca-is-embedding-indigenous-culture-and-practice-in-csnet/

Host International

Why outcomes are important for settlement services

https://csnet.net.au/host-international-and-csnet/

Family Support Newcastle

How a holistic focus on children & families changes 'siloed services'

https://csnet.net.au/how-a-holistic-focus-on-children-families-changes-siloed-services/

Costs (excl.GST)

Item	Type	Amount
Purchase fee	One-off	Nil
Set-up/implementation[7]	One-off	Will vary according to the number of program 'minimum data sets' & integrations requested eg - CLASS 'out of the box' solution to cover NLAP minimum data set requirements, integration & risk management features & templates $15,000 - DEX 'out of the box' solution to cover DSS Minimum Data Set, Partnership Approach, surveys / outcomes mapped to SCORE & integration $10,000 - CSnet training & support for implementation is included –24 hours are included for training & support for implementation. Additional training / support can be requested @ $124/hr Other optional features such as - - Inbound Data - Integration with organisation's website webform $2,856 - Integration with Azure Active Directory SSO $2,856
National Data Repository integration	One-off	Included in the one-off implementation fees
Data migration from CLASS	One-off	Depending on the scope of the data migration, this may cost between $9,000 - $18,000. CSnet is working with CLCA on options for data migration and further details about the options will be shared. Options for discussion - 1. Basic client & external party details to support conflict checking in CSnet 2. More comprehensive data migration with matter details & case notes & conflict checking 3. Exploring support for bulk document migration from CLASS to CSnet.

Licensing (per staff member)[8]	Ongoing	Sliding scale for **Standard user licence fees / user / year**

	Ex GST / user / yr
5 users	850
6-10 users	803
11-15 users	777
16-20 users	729
21-25 users	681
26 – 30 users	650
31 – 35 users	600
36-40 users	550
41-45 users	527
46-50 users	475
51-100 users	427

Licensing (per volunteer)	Ongoing	**Discount sliding scale for volunteer 'slimline' user**s - rates based on 1/3rd the cost of the standard per user licence fee. CSnet is offering a further discount to the per volunteer rate so that it is reduced to the per 'slimline volunteer' rate based on total volunteer numbers across all CLC databases Example – 201 volunteers across all CLC databases @ $109/volunteer/yr
Support	Ongoing	$124 per hour

---

[6] Community Legal Centres Australia received the costs information included in this table from CSnet in late 2023. However, CSnet has advised they will revise their pricing in February 2024. Centres should request an individual quote from the vendor to ensure decision-making is based on up to date, tailored information.

[7] Note: this cost does NOT include centre-specific configuration required, which are charged on a case-by-case basis and will vary from centre to centre.

[8] As above, licenses should not be shared between multiple people. Every staff member and volunteer should have their own license, even those who are part-time.

General functionality for community legal centre work

This assessment was written by CLCA as part of the comparison report provided to CLCs in February 2024.

The table includes user feedback gathered via:

- *Survey feedback from Tenants Union Qld on its experience of the product in 2021*
- *the ICDT team's experience over the past 3 years assisting centres to migrate data to modern CMS tools*
- *anecdotal evidence the ICDT team has gathered through responding to ICDT helpdesk queries, ongoing conversations with centres, meetings, site visits and webinars*
- *feedback from ICDT Advisory Group members.'*

Strengths	Weaknesses
Excellent client, matter, and service management. *Very easy to find people in the system. The client history tab shows all matters/group activities that the client has participated in over time.* *Strong on managing complex clients with a range of legal and non-legal problems.* *Customisable warnings and alerts (such as for high-risk clients).* *Tracks referrals.* *Has file opening and closing checklists.* *Supports security and matter access controls.* *Supports the creation and sending of surveys to clients and community participant and linking survey data to the measurement of multiple social outcomes and impact frameworks.* *Can be configured to manage unique users, teams, client warnings, and funding tags.* *Client and matter risk assessment can be recorded in the system, and it can report on the percentage of sessions with a timely completion of risk assessment.* *Has over 300 out-of-the-box reports.* *Strong user community.* *Very good support from the vendor, including free monthly organisation catch- ups and fortnightly User Groups facilitated by CSnet.*	*Fairly complex user interface.* *Poor integration with Microsoft tools, but there is a one-way sync with any online calendar, and SMS appointment reminders can be sent to clients from the CSnet calendar.* *Documents cannot be viewed in the application; they must be downloaded.* *Adding new reports requires developer support but users can download client data to internal servers and use business analytics tools to create reports.* *Configuration of reports is by the provider rather than the user however this feature is on CSnet's development roadmap.* *Allows for template creation, however this requires CSnet support.*

Unique sector data and reporting requirements

CSnet is customised to comply with the National Legal Assistance Data Standards. Community Legal Centres Australia has successfully completed a test import of CSnet data into CLASS. We will be undertaking a test import of CSnet data into the National Data Repository in 2024 and do not anticipate any issues with this. CSnet also has real-time integration to DEX and supports data collection & reporting against a range of funding programs including financial counselling, family relationship & dispute resolution services, Primary Health Network Mental Health Advocacy programs, other programs including those reporting to P2i (Qld Department of Communities).