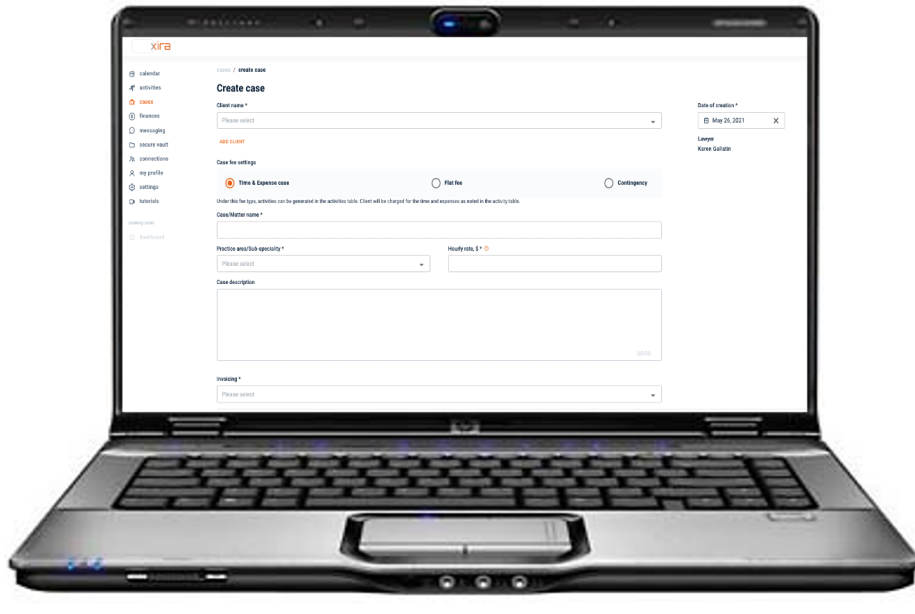


11 tools to optimize your business

Tool #3: Case Creation and Management



advantages of XIRA's case creation and management

1. enables better record keeping and protection against loss of client data
2. saves time by having all case details stored in one, secure, centralized repository
3. securely access client files online where ever you are
4. tracks your billable hours in real-time
5. improves client satisfaction by making it easy for your clients to upload and download documents linked to their case

Case creation and management covers a range of approaches, methodologies, workflows, and technologies used by solo and small legal practitioners to manage the life cycle of a case or matter more effectively. Having a robust case management solution is critical to helping you improve visibility across all your cases, so you can focus on keeping your clients satisfied and practice running smoothly.

XIRA's case creation and management

XIRA's GAVEL platform contains a complementary, integrated, case management tool that enables attorneys to securely manage and organize their case data online for new or existing clients.

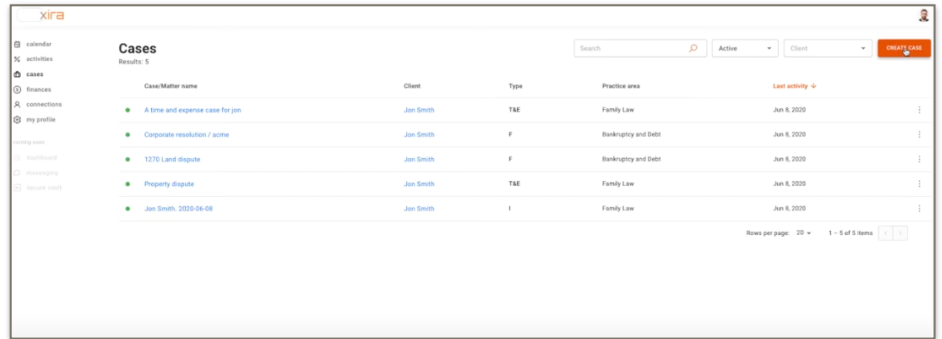
Our case creation and management functionality provides solo-small law practitioners with:

- integrated time tracking and expense management for billing
- flexibility to choose an invoicing mechanism that accelerates your time to revenue
- improved file organization by linking the case with the corresponding folder in the document repository ("secure vault" tab)
- ability to quickly find a client by name and see a brief summary of the case
- capability to download all pertinent case data to into Excel to conduct a detailed analysis of the profitability of your cases.

case organization

Since cases are the heartbeat of your practice, it is critical for you to be able to organize and have a comprehensive view to all information about your clients and their specific cases. XIRA provides organization and visibility to cases by helping you:

- link matter name, description, case fee type, practice area, documents, and billable activities to the proper client.
- quickly find what you are looking for by using the search box or filters at the top of “cases” screen. You can use the search field by entering specific words, client name, or case name. Use the filters to search by client or to view active, inactive, or all cases. You can also change the order of how the case screen data is displayed: by case/matter name, client name, fee type, practice area, or activity date.
- capture all details of the work done for a client as well as view all invoices that are pending, sent, and paid/unpaid.
- share and exchange only those documents you want the client to have access to as well as add any private documents you’ve prepared for a specific case.



Case/Matter name	Client	Type	Practice area	Last activity
A time and expense case for job	Jan Smith	T&E	Family Law	Jun 9, 2020
Corporate resolution / acme	Jan Smith	F	Bankruptcy and Debt	Jun 9, 2020
1270 Land dispute	Jan Smith	F	Bankruptcy and Debt	Jun 9, 2020
Property dispute	Jan Smith	T&E	Family Law	Jun 9, 2020
Jan Smith, 2020-04-08	Jan Smith	F	Family Law	Jun 9, 2020

“cases” summary view

how it works

We’ve made it easy for you to start creating cases with our case creation form. The case creation form, while key, is simple to use. Here are the steps to create a new case:

1. log in and select “cases” tab (briefcase icon).
2. click orange “CREATE CASE” button in upper right hand corner.

The form is very flexible and self-adjusts depending on the type of case fee setting selected (time and expense, flat fee, and contingency). For example, in a time and expense case your standard hourly rate is auto-populated. However, if the case is a flat fee setting type, a payment schedule is required, but the standard hourly rate field is not presented.

3. type registered client’s name and select from dropdown menu. You can also click “ADD CLIENT” to create a case for an existing client. An invitation is also sent to the existing client to register on the XIRA platform. Existing clients are encouraged to register so they can schedule time on your calendar, video conference with you, view/pay invoices, share documents, and communicate with you by sending private, secure messages.
4. select your case fee setting type. Financial fee arrangements between attorneys and clients can vary depending on the practice area, specific case details, and client. XIRA supports these most common legal fee types:

- **time and expense:** charges to the client are based on your standard hourly rate (or portion of an hour) for time spent on case activities plus any associated expenses. The time spent (“NEW TIME ENTRY”) and expenses (“NEW EXPENSE ENTRY”) to be invoiced are recorded in the “activities” tab (person running icon). The standard hourly rate is defaulted to the practice area value set previously, but can be adjusted (as mutually agreed with client) either in the “Hourly rate, \$” field, or in the “activities” tab when a new time entry event is recorded.



case fee types

XIRA supports the most common types of attorney legal fees:

- time and expense
- flat fee
- contingency

Others types of legal fees like retainer, referral, pro-bono, etc. are planned to be introduced in future releases.

case creation form

- **flat fee:** a specific, total fee you charge the client upfront (as mutually agreed) can be entered in the “Total amount, \$” field.
- **contingency:** you and the client agree that payment will be a percentage of the amount awarded in the case. The percentage agreed to can be documented in the “Case description” field.

Note: with flat and contingency fee types, you can also track any associated expenses in the “activities” tab. To invoice and charge the client for case-related expenses, engage the **“Expense invoicing”** toggle and select your invoicing frequency (see step #7 below).

5. enter the name you want to call the case/matter.
6. select the practice area/sub-specialty and enter a case description.
7. finally, select the invoice frequency mechanism: XIRA’s innovative invoicing capability automatically generates invoices for all activities entered for a client’s case. Thus, there is no further effort required on your part for invoicing once an activity has been recorded.
 - **“Invoice by date”** allows you to enter a specific billing date associated with each activity you record. If you create multiple activities and expenses with the same billing date, then all are combined into one, single invoice that is then sent to your client on that specified date. By increasing your billing frequency, you can accelerate your time to revenue!
 - typically, attorneys invoice monthly, or even less frequently, which can cause “invoice shock” for the client. **“Periodic invoicing”** enables you to bill either at the end of every week or end of every month, making it easier for clients to make smaller payments as the case progresses. All activities and expenses are automatically collected into a single invoice and sent to the client (either weekly or monthly).

- for flat fee cases you can choose to pre-program invoice dates and milestone payments, up to the total amount agreed to in the **“Invoicing schedule”** field.

By selecting the “ADD MORE” button, you can establish future payments requests now, or come back later to schedule whenever you choose. The “Balance” pending to be invoiced will be automatically updated as you schedule payment requests. However, this function is optional and you can leave the “Invoicing schedule” field empty until you are ready to invoice your client (partially or for the entire amount).

8. select the orange “CREATE” button at the bottom of the screen. That’s it. You’ve now created a case!

inactive cases

When a case is completed or no longer active, it can be set to “Inactive” from the “cases” tab. Simply, select the three ellipses next to the specific case you want to “make inactive”. GAVEL performs an automatic check to ensure that there are no outstanding activities or invoices pending before the case status can be moved to “Inactive”. All “Inactive” cases and associated documents are stored in GAVEL for future reference. To view closed cases, select the “Inactive” filter at the top of the screen in the “cases” tab.

You are now an expert at using XIRA’s case creation and management functionality!

have questions?
for any other questions you
may have, send an email to
info@xira.com

get XIRA's free
mobile app now!



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rev. a 6/21

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