

Case Management & Docket Control

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PLEG140-Law Office Management

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June 2015

## Introduction

Case management and docket control are essential elements that make a law firm successful and sufficient. Both systems are beneficial to those that work in a law firm whether a small firm or larger corporation. Having Case management and docket control systems help assure that deadlines are never missed and conflict of interest is avoided. Both systems are a great way to keep client information confidential, documented and organized

## Case Management

Client management software (or case management software) is used by law firms to keep track of their client information. Case management training often focuses on agency-specific activities, such as classification, transfers and treatment program'. The ability to manage caseloads and the associated paperwork will determine the success or failure of case managers and, by extension, their supervisors and agencies. (Giddings, 2015). It allows making fewer trips to the filing cabinet by tracking a great deal of client information and save company's money and time from searching the files. There a different levels of functionality and there are functions that are central to virtually all case management systems. It is a great way to control the client database and store information regarding each case. Case management is described as operating on bundles of content rather than individual documents or images. A "case" is a compendium of information, processes, advanced analytics, business rules, collaboration, and sometimes social computing that relates to a particular interaction with or issue involving a particular party like a customer, supplier, patient, student, or defendant. (AIIM, 2015.) Another advantage to having case management systems is the ability to work remotely. Systems like Lexis can also be used online for research purposes. Most law firms have an internal case management system that they

use for conflict checking, opening of new matters, billing, tracking client accounts and client information.

### Docket Control

Docket control is typically a way of entering, organizing, and controlling all the appointments, deadlines, and due dates for a legal organization. To assist in planning, many docket control software allow multiple reminder dates. A docket control system should contain some standard docketing items but it should also allow the person entering the data to add and customize due dates for each item that is entered. There are many ways a firm can maintain their schedules and adhere to all appointments and deadline. Calendar Management helps set appointments and keeps track of deadlines through programs such as Microsoft Outlook. Tracking systems, also known as tickler systems, remind firm employees of important dates which prevent missing a statute of limitations or a claim statute that can result in a malpractice claim. (Hames, 2015.)

### Conclusion

Docket control/case management works differently depending on the specific legal organization, the types of cases handled, and the organization's philosophy on how functions should be managed. (Nollkamper, 2012). Although these system's functions may differ, both are an essential tool for having a successful firm. An article by Leslie Wimmer states, key qualifications paralegals need to be successful are a solid knowledge of the law, and the ability to be extremely organized and finish work ahead of deadline. (2009). This is true when it comes to utilizing electronic programs such as those through case management and tickler systems. Smaller firms may refer to manual systems, but with changing times and technological advancements, it is always a benefit to have advanced programs put in place.

## References

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