

**Case, Matter, & Practice Management System
Software Web Site**

Sample CMS Requirements Checklist

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Type of Practice	
<ul style="list-style-type: none"> • Private • Corporate • Government 	
Client Representation	
<ul style="list-style-type: none"> • Plaintiff • Defense 	
Users	
<ul style="list-style-type: none"> • # Lawyers in firm/law department • # Staff in firm/law department • # Total office locations - main, branch 	
Primary Practice Areas	
Initial Case Information Input Methods	
<ul style="list-style-type: none"> • Current Case/Matter Numbering Method or Style • Current Method/Procedure for Accepting New Case • Case Information Intake Sheets (Examples) • Number of Active Cases (Total, by Practice Area) 	
Current Calendaring Methods & Procedures	
<ul style="list-style-type: none"> • Manual • Microsoft Outlook • Novell GroupWise • Lotus Notes • Tickler System (Examples) • How Does the Firm Calculate Dates? • How Does the Firm Handle Tasks for Particular Cases? 	

Does the Firm Use "Rules-Based Calendaring?"	
<ul style="list-style-type: none"> • Number of Different "Rules" Required • Current Method for Calendaring Multiple Dates 	
How Does the Firm Track Time?	
How Does the Firm Track Expenses?	
Current Method for Checking Conflicts?	
Case/Matter Diary	
<ul style="list-style-type: none"> • Current Method for Diaring Case/Matter Events • Does the Attorney or Legal Assistant Keep Notes in the File? • Current Method for Determining Case Status & Information Required 	
Document Generation	
<ul style="list-style-type: none"> • Does the Firm use "Boilerplate" Documents? How Many? • Does the Firm use the "Merge" Feature of Corel WordPerfect or Microsoft Word? • Does the Firm have a Forms Directory? • Does the Firm Keep a Document History? 	
Document Management	
<ul style="list-style-type: none"> • Does the firm use a DMS? • Documents stored by attorney? • Documents stored by client? • Documents stored by matter? 	