



DPS Probate

DPS Probate has been developed for the practitioner who needs to be free of the time consuming and highly repetitive aspects of the probate procedure.

The primary focus of the system is to produce Estate Accounts and Schedules of Assets, Liabilities and Gifts before automatically generating and completing all IHT forms relevant to the matter. Of course the elements expected of a DPS application such as quick and efficient production of letters and documents, diarisation of tasks and monitoring work completed are all part and parcel of the system. The required forms are completed automatically and the accounts are passed into MS Excel™ for further editing if required.

Document Assembly and Management

DPS Probate is provided with a set of standard precedents, such as documents, forms and letters, which are automatically assembled with all matter details fully completed.

Precedents include:

Letters to Public Utilities	Inland Revenue Payment of Tax
Letters to Life Assurance Companies	Schedules of Assets
Letters to Asset Holders	Application for Probate
Oaths	Trustee Act 1925 Section 27 Notice
Notice to Local Papers	Stock Transfer Forms

All information relating to the matter, such as the client's name, the asset holders names or reference codes need to be entered only once onto the system, which in turn reduces the time spent on manually completing time consuming and often highly repetitive work. Users with basic typing skills can use the system competently, as DPS can complete the majority of the work automatically in a fraction of the time.

Furthermore, DPS now encompasses Windows drag and drop facility to allow you to scan incoming letters and automatically drag and link to any case file within the DPS system. Faxes and e-mails can also be linked to files in the same way.

IHT Forms, Schedules of Assets, Liabilities & Gifts

DPS Probate can produce all the required estate accounts for a case directly in MS Excel™, from data that has been entered into the system. This translates into complete schedules of Assets, Liabilities and Gifts. The same information is then transferred into the requisite IHT forms, which are automatically completed.

Flexibility

Although, DPS comes complete with a standard precedent library, the system is extremely flexible. Adding or omitting standard clauses, sentences and precedents, is easy, as is adding bespoke paragraphs or sentences to a document for an individual matter. This allows you to keep complete control and adapt the system as and when necessary, to suit your requirements.

Quality Management Standards

The high level of procedural control offered by the system is ideal for assisting in meeting the quality management standards required by leading specialist panels such as ISO 9002.

Outlook Integration

If required the whole system can be used from within MS Outlook™, through Outlook Office/One Office, or through a browser. This gives clients the choice of which method suits which department. A fee earner may be better suited to Outlook™, whilst a secretary may choose One Office. A work referrer may choose to access files from the web which does not require any local software.

In either case, the whole system is live and gives the same information wherever the system is accessed from. Outlook™ allows instant communication with your clients and their case files. It allows users to save incoming e-mail messages directly onto case files by simple dragging and dropping the message(s) onto the relevant file(s) in one easy step or by choosing the file to add selected emails to. Moreover, the Outlook™ diary (Calendar) can be synchronised to DPS' Tasks (To Do) List for increased efficiency in time management and planning.

Fee Earner Tasks

Outlook Office/OneOffice tracks all work completed on the file and saves anticipated next steps according to the workflow in the task diary. When a fee earner logs into the system, they are able to view what work needs to be completed on any file on that day, and any tasks carried over from the previous day.

From one screen, the fee earner can: view the whole file history; compose emails, write letters or make phone calls; reschedule tasks to another day for another fee earner, and complete tasks. Supervisor users can view tasks for other users and take actions on behalf of them or assign tasks to other users.

Workload & Work Done

From a single screen a fee earner can view all the work assigned to them including emails in, letters in and scanned images. Fee earners can also view work already completed by or on behalf of them from the same single screen. Even the fee earner's postal items can be viewed electronically.

When a supervisor comes to review a file, they can view exactly what work has been assigned per user in any one day or period of time. The supervisor can also view what work a user has completed or had completed on behalf of them. This information can also form the basis for report creation.

Marketing

DPS can be a powerful marketing tool for your firm. It allows you to selectively mail and personalise mailers to target your clients more effectively.

Accounts Integration

The Probate system integrates seamlessly with DPS Cashier Accounting system to give you a complete practice management system for all personnel within your firm.

DPS also gives you the option to add the DPS Cashier Accounting system at a later date, should your future circumstances need to facilitate an accounts system. Benefits of this integration are real-time and bi-directional, so any updates made on one system are automatically accepted and updated on the other system.

The design reduces the time spent on the input and checking of data on two systems, whilst ensuring that accounts data is kept fully up-to-date on case files within all systems.



To view our online demonstrations visit www.dpssoftware.co.uk or for further information of this or any other DPS application please call us on 020 8804 1022 or email info@dpssoftware.co.uk

