

Colman Coyle LLP

Colman Coyle LLP have adapted DPS to process the cheques they receive as part or full payment for the settlement of Personal Injury cases. The screens and workflows that they have created have saved the firm up to an hour per cheque being processed and has saved the company the salary of a senior Paralegal.

The cheques come in, which are normally part payment of the final settlement amount. There are two problems that they had with the manual system. The initial working out of the costs (which they can do with DPS), and the issue of paying the disbursements. They have started putting all disbursements into Cashier regardless of whether they have been paid or unpaid (e.g. Council fees are not paid until settlement comes through). On paper based systems, these tend to be forgotten about. The way the firm works is the file gets moved across several fee earners, throughout its life. It can go from the standard department, to the multi track department, to the cost department to recover costs and it could have gone through 6 different people. The costs therefore have to be split out across these fee earners. Manually these calculations can take anywhere from ½ to 1 hour to do, as the firm must make sure each fee earner gets their bit, all the disbursements have been accounted for and the client's settlement amount has been calculated. This is all before they can produce an invoice and transfer sheet for accounts.

"This had to change", said James. "We could not have one person sitting there taking an hour to do one cost cheque, as we could have 10 cost cheques a day, meaning we'd be over by two each day".

They changed the DPS PI system so that when a matter is settled, the system asks for a settlement figure, and stores it in DPS. It also grabs the WIP amount and the disbursement figures at settlement. They then do various calculations on the numbers so that they can start processing the cheques.

James has created a new screen in DPS that lists the settlement date, settlement figure, costs, disbursements and WIP. He runs a damages negotiation attendance note (that has 17 pages of logic behind each screen!!!) and puts in the settlement figure. This is when the system takes the WIP figure for consideration. A Fee Earner then runs the Transfer to Cost Department attendance note. The Cost Department then assesses the matter when the cheque comes in and they enter the details onto the system, (he has allowed for 3 cheques).



Client Story

The user then goes into the screen, fills in the cheque amount and tags the disbursements they want to pay. The system then uses the 17 pages of logic to calculate how much of the cheque amount is needed to pay the firm's Profit Costs, how much is for disbursements and then allocates the balance to the client. The system then updates the summary screen with the outstanding balances. Following this, a second screen pops up to allow profit costs to be apportioned to each file, as a percentage. This then produces the invoice and transfer sheet.

The manual task, as well as taking up to an hour, was also overseen by a senior Paralegal. Now using DPS, the process takes minutes and only needs a junior Paralegal to oversee it.