

Matter Intake

Manage the Matter Intake Process

Matter Intake makes the task of gathering information for prospective new clients and matters easier to manage. New matter information is collected on an electronic intake form—a single data entry point that gives your firm greater control of the intake process.

Is your firm still using a paper-based system to set up new matters?

Can you easily track the progress and view the history of your matter intake forms?

Use a Single Point of Data Entry

A paper-based system can lead to information being entered incorrectly when it is later keyed into Omega Legal^{vx}, adding delays to the process.

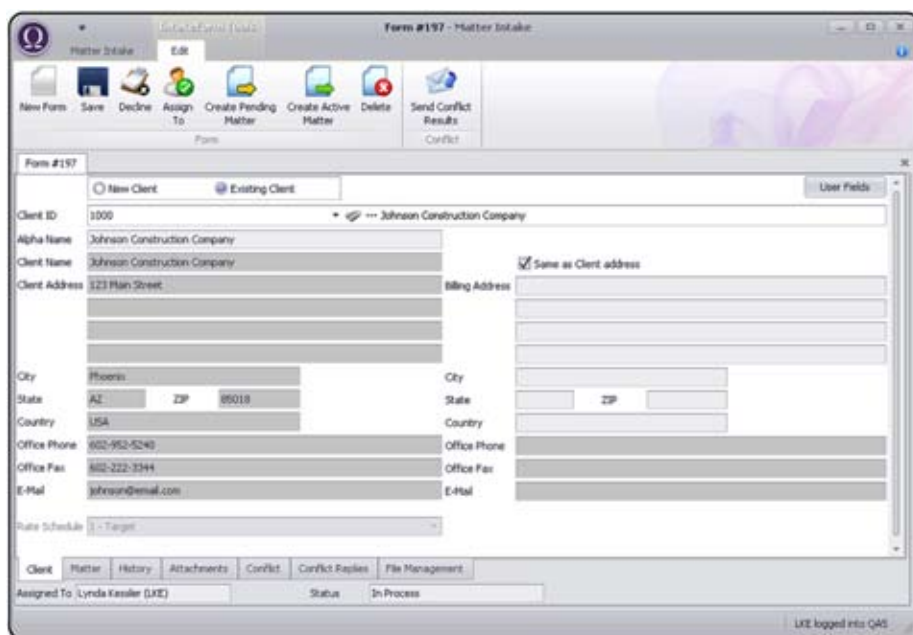
With Matter Intake's paperless process, users enter new client and matter information directly into the system through a simplified, yet comprehensive, interface. The entire matter opening process is streamlined with integrated lookup tables and defaults.

Mandatory fields make it unlikely that critical information will be missed. Newly hired users can quickly learn to complete Matter Intake's electronic forms, reducing training time.

Send Conflict Search Results for Review and Approval

Once the client/matter information is entered into Matter Intake, the form can then be assigned to other users, who, after being notified by email, perform a conflict search and secure necessary approvals.

The conflict report can be attached to the new matter intake form and then automatically emailed to the appropriate firm members for their review and response. The program tracks their approval responses, viewable within each form.



Easily Create Pending & Active Matters

When all required fields are complete, you can quickly create a pending matter from the intake form. All data is immediately updated into Omega Legal^{vx}. At the end of the process, when you choose to create an active matter, no additional steps are necessary—the data does not have to be re-keyed, preventing errors and time delays.

Track Progress of Intake Forms

A lookup gives you the ability to see every intake form in the system. You can view what part of the process it's in, who it's currently assigned to, and how long it resides at each stage.

View an Audit Trail

Matter Intake's history log provides a record for each matter intake form, displaying which tasks have been completed and by whom, with a time and date stamp of when the task transpired.

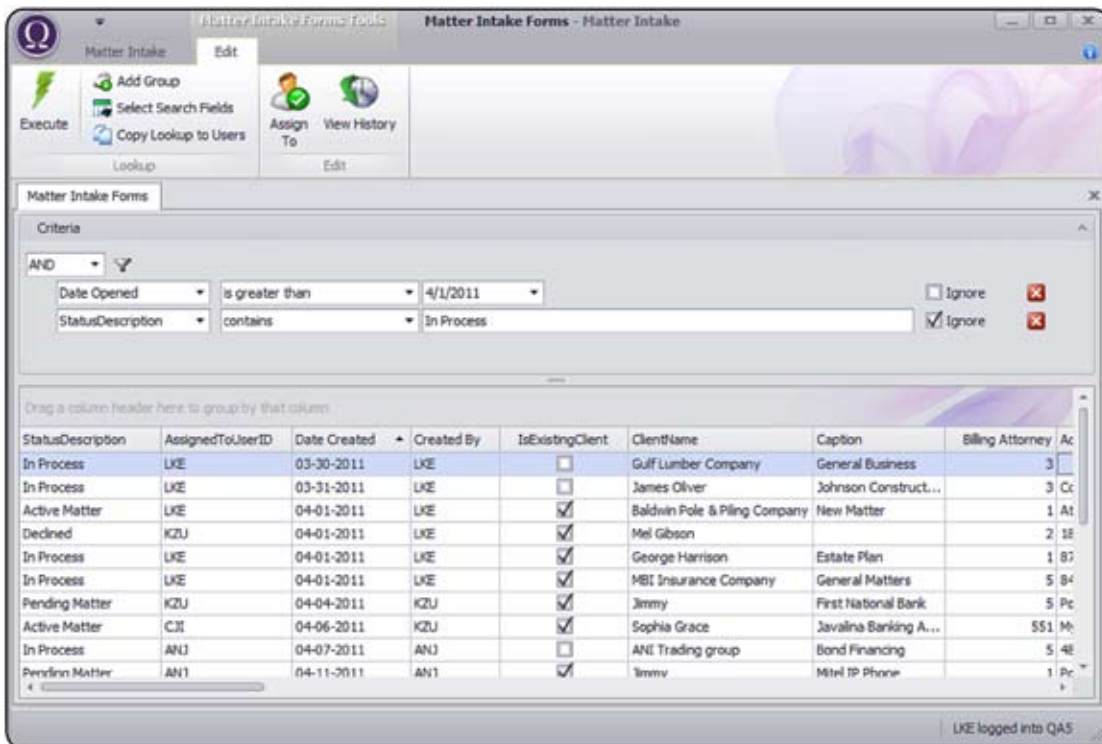
Streamlined Intake Process:

Enter new client/matter information into a single point of data entry

Attach Conflict Search results to the intake form for distribution and approval

Track an intake form's progress from start to finish

Create an active matter quickly from the completed intake form



StatusDescription	AssignedTo:UserID	Date Created	Created By	IsExistingClient	ClientName	Caption	Billing Attorney	Ac
In Process	LKE	03-30-2011	LKE	<input type="checkbox"/>	Gulf Lumber Company	General Business	3	
In Process	LKE	03-31-2011	LKE	<input type="checkbox"/>	James Oliver	Johnson Construct...	3	Cc
Active Matter	LKE	04-01-2011	LKE	<input checked="" type="checkbox"/>	Baldwin Pole & Piling Company	New Matter	1	At
Declined	KZU	04-01-2011	LKE	<input checked="" type="checkbox"/>	Mel Gibson		2	SE
In Process	LKE	04-01-2011	LKE	<input checked="" type="checkbox"/>	George Harrison	Estate Plan	1	B7
In Process	LKE	04-01-2011	LKE	<input checked="" type="checkbox"/>	MBI Insurance Company	General Matters	5	B4
Pending Matter	KZU	04-04-2011	KZU	<input checked="" type="checkbox"/>	Jimmy	First National Bank	5	Pe
Active Matter	CJI	04-06-2011	KZU	<input checked="" type="checkbox"/>	Sophia Grace	Javalina Banking A...	551	Mh
In Process	ANJ	04-07-2011	ANJ	<input type="checkbox"/>	ANI Trading group	Bond Financing	5	4E
Pending Matter	AN1	04-11-2011	AN1	<input checked="" type="checkbox"/>	Timmy	Metel TP Phone	1	Pr

Customize Your Workflow

Although most law firms follow a similar intake process, Matter Intake's workflow can be customized to meet your firm's individual needs. In addition, custom fields can be added to Matter Intake's forms.

Omega

Omega is a privately held Scottsdale-based company that provides mid-to-large size law firms an integrated financial and practice management software suite that sets the standard for return on investment, system performance and service. Since 1975, Omega has been solving critical business issues for law firms, improving their profitability, productivity and efficiency.