

# eclipse

A DXC Technology Company



DXC Technology  
**Legal Case Management**  
for Microsoft Dynamics 365

## **Legal Case Management User Guide**

### **Microsoft Dynamics 365 CRM**

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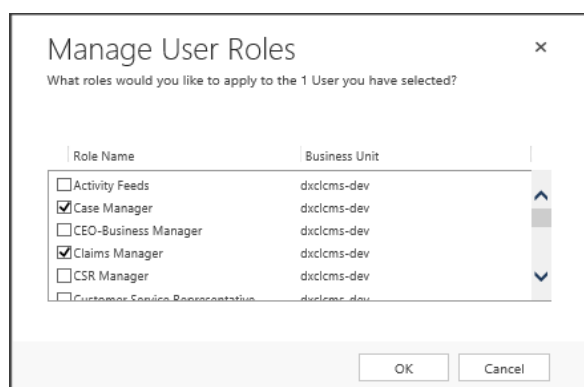
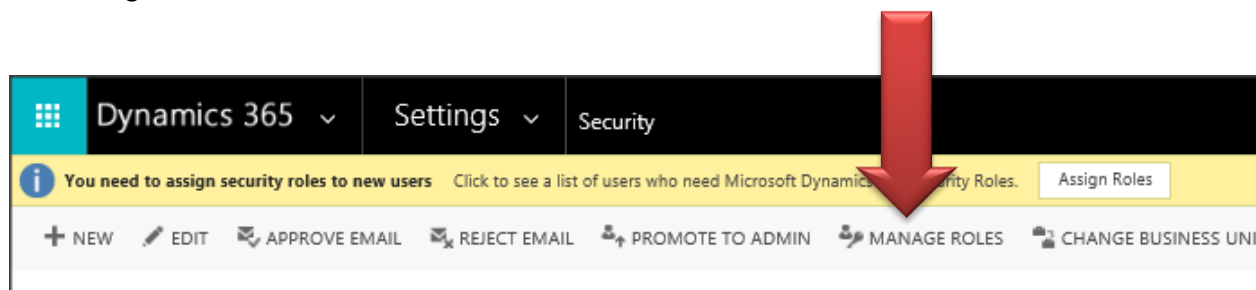
## Introduction

This user guide is designed to provide end users with an overview of how to setup and use the DXC Legal Case Management solution (LCMS) Add-on. It provides a user walkthrough to establish a typical use case for a customer whilst covering the setup at the same time.

## Adding Security Roles to Users

Before any setup or configuration occurs, the extension must be enabled by configuring the Security Roles to be active and assigned to users.

To access the Security Setup, go to Settings -> Users and select a user(s) to assign roles to and click on the Manage Roles icon.

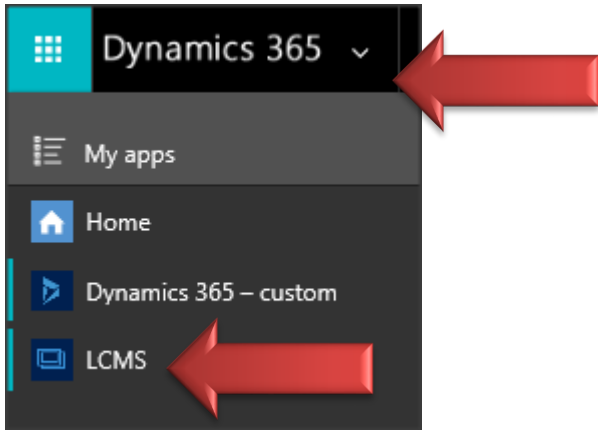


Assign Users the Security Role you want them to have access to, by selecting one or all of the following:  
Case Manager  
Matter Manager  
Claims Manager

Adding security roles to users will give access to each feature and their respective functionality

## Navigate to the LCMS App

Users that want to navigate to the new LCMS app click on the Dynamics 365 Logo in the upper left of the screen and click the down arrow and select LCMS

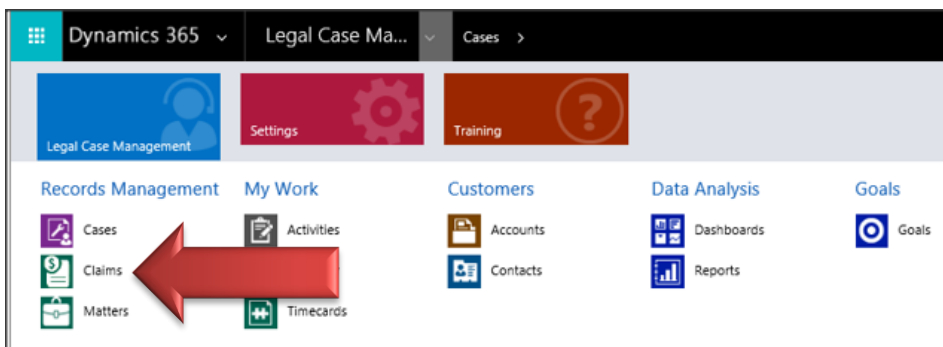


## Claims Walkthrough Scenario

Managing claims has been simplified and streamlined with LCMS. The claim form has been pre-configured to include common data elements and case activity types for claims as well as a starting point work-flow. The data elements included on the claim form along with the activities and work-flows can be easily modified through configuration to make the system work the way that your agency does business.

This scenario will walk you through how to setup a new claims record, copy the record, and convert it to a new case. The final step will review the claims dashboard.

### Open Claims Area in LCMS



## Step 1: Create New Claim

- 1) Enter Claim Details, Claimant and their Attorney.
- 2) Enter Additional Participants by clicking on the + button
- 3) Add additional Claim Team Members you want to collaborate with

**CLAIM**  
Jones vs City - 00001

Resolution: In Progress | Status Reason: Active | Assigned Lead: Jon Rastia

CLAIM DETAILS				ADDITIONAL PARTICIPANTS			
Title	Jones vs City - 00001	Department	--	Participant	Role	Primary	Relationship
Claim ID	00001	Type	Personal Injury	Gina Talbot	Attorney	No	
Filed On	10/23/2017 8:00 AM	Resolved Date	--	John Smith	Claimant	Yes	
Priority	Medium	Claim Settlement	--	Sue Miller	Witness	No	Friend
Remedy	Dollar Amount	Assigned Assistant	Pat Green	Todd Gilmore	Witness	No	Friend
Claim Amount	\$5,500.00	Incident Description	Fell on city sidewalk to broke arm.				
Assigned Lead	Jon Rastia						

PRIMARY PARTICIPANT		CLAIM TEAM	
Claimant	John Smith	Attorney	Gina Talbot
Full Name	Job Title	Main Phone	Mobile Phone
Pat Green		(111) 234-0001	(111) 234-0333

CLAMANT DETAILS		CLAMANT DETAILS	
Email	someone1@test.com	Law Firm	Jones Law Firm
Mobile Phone	(111) 111-0000	Email	someone2@test.com
Business Phone	--	Mobile Phone	(111) 222-0000
		Business Phone	(111) 222-1234

- 4) Enter Injury Details
- 5) Enter in Settlement and Award Payments
- 6) Enter relates Claim Activities such as Emails, Tasks, Appointments, or Phone Calls

**INJURY DETAILS**

INCIDENT DETAILS			
Incident Date	10/21/2017	Frequency	One Time
Treating Facility	St. Marys Hospital	Treating Physician	James White
Estimated Expense	\$4,500.00		
Injury Description	Broken Left Arm		

**CLAIM ACTIVITIES**

SETTLEMENT OFFERS				
Type of Award	Award Amount	Amount Recove...	Claim Costs Due	Award Balanc...
Cash	\$5,000.00			

ACTIVITIES	
Jon Rastia	Claim Settlement Today
Jon Rastia	Claim Summary Today

## Step 2: Copy Claim

Create a copy of the claim record by clicking on the Copy Claim button

Dynamics 365 | Legal Case Ma... | Claims > Jones vs City - 00001 >

+ NEW | DEACTIVATE | DELETE | PROCESS | ADD TO QUEUE | QUEUE ITEM DETAILS | CONVERT CLAIM | COPY CLAIM

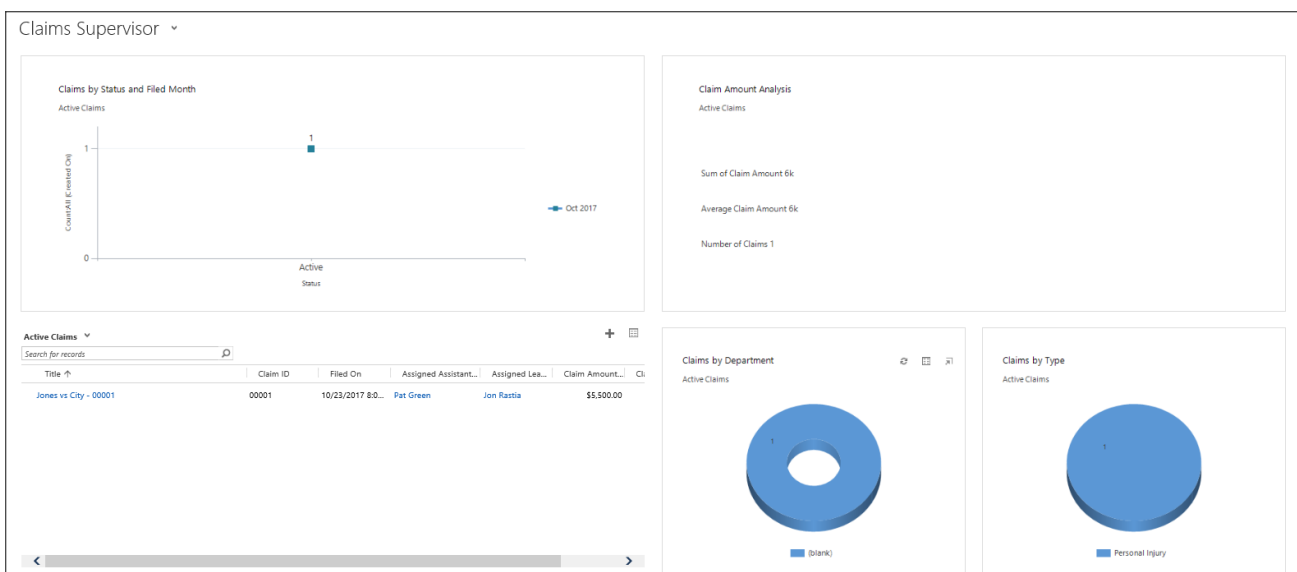
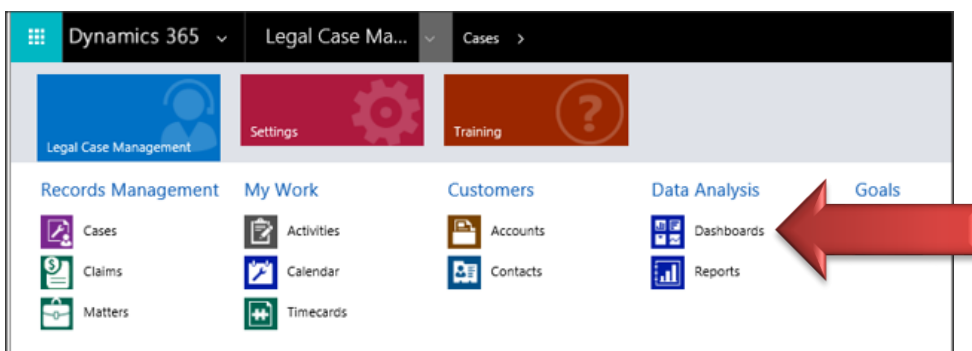
## Step 3: Convert Claim to Case

Convert the claim into a case to prepare for litigation steps



## Step 4: View Claim Dashboard

- 1) Open Dashboards Area in LCMS
- 2) Open Claims Supervisor dashboard



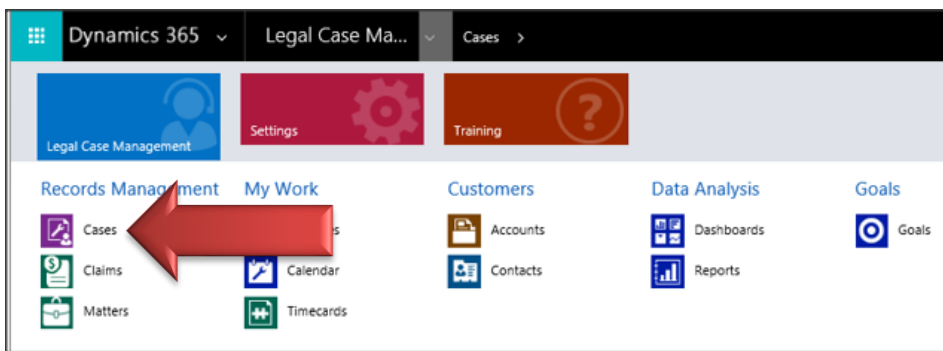
## Case Walkthrough Scenario

The case form for lawsuits has been pre-configured to include common data elements and case activity types for lawsuits as well as a starting point work-flow. As with claims, the data elements included on the case form along with the activities and work-flows can be easily modified through configuration to make the system work the way that your agency does business.

Time cards can be accessed directly from the case form making time tracking easy and convenient. Time tracking data for the case is displayed and time entries can be submitted to the billing system with a single mouse click.

This scenario will walk you through how to setup a new case record, add participants, work with case actions and add time spent on a case for reporting and billing purposes. The final step will review the case dashboard.

### Open Cases Area in LCMS



## Step 1: Create New Case

- 1) Enter Case Details
- 2) Enter Court Details
- 3) Enter Arrest Details
- 4) Enter Case Participants Plaintiff and Respondent
  - a. Enter Additional Participants by clicking on the + button

City vs Brady Dillon

Submitted On: 10/24/2017 10:11 AM | Disposition: In Progress | Time Tracking: 00:11:10

Case Type (Active for 2 hours) > Initiate Case > Discovery > Pre Trial Activities > Trial/Disposition > Post Trial/Compliance

CASE DETAILS			
Title	City vs Brady Dillon		
ID	CAS-00000-P4Q3P0		
Division	Criminal	Government Party	Plaintiff
Department	Felony		
Waiver Attached?	No	Waiver Due	11/23/2017
Respond by	11/3/2017		

COURT DETAILS			
Court Case #	4957346-HFG-2017	Judge	Bob Sanders
Disposition	In Progress		
Appealed	<input type="checkbox"/>		

ARREST DETAILS			
Date of Arrest	10/22/2017		
Arresting Agency	Arresting Officer: Dan Jullion		
Arresting Agency - City	Bond Type: Cash Bond		
Bond Amount	Bond Type: Cash Bond		
\$5,500.00	Cash Bond		
Bond Hearing Date/Time	10/22/2017 8:00 AM		

CASE ACTIONS						
Attachment Status...	Action Type	Date Created	Activity Status...	Due Date	Actual End	Description
No Case Action records found.						

CASE PARTICIPANTS					
Plaintiff	City - Government			Respondent	Brady Dillon
Participant	Role	Attorney	Primary	Minor	
Dan Jullion	Arresting Officer		No	No	
Bob Sanders	Judge		No	No	
City - Government	Plaintiff		Yes	No	
Brady Dillon	Respondent		Yes	No	

- 5) Enter Charges
- 6) Add additional Case Team Members you want to collaborate with
- 7) View Case Complexity Details

**CHARGES**

Case No.	Statute	Charge (Statute)	Defendant	Plea Type	Outcome	Serial
1	34463408.2	Assault and Battery	Brady Dillon	Not Guilty		
1	38479.2	Resisting Arrest	Brady Dillon	Guilty		

**LEGAL TEAM**

Lead Attorney \* Jon Rastia Case Officer --

Full Name	Job Title	Main Phone	Mobile Phone
Gary Hill		(111) 222-0598	(111) 222-0120
Linda Klien		(111) 222-2000	(111) 222-4900
Pat Green		(111) 234-0001	(111) 234-0333

**CASE COMPLEXITY**

Total Charges Complexity	4.50	Case Score Temp	15.75
Complexity Score	15.75	Complexity	Highly Complex

### Step 3: Add Case Actions

- 1) Enter Case Actions
  - a. Enter case actions by clicking on the + button

**CASE ACTIONS**

Attachment Status...	Action Type	Date Created	Activity Status...	Due Date	Actual End	Description
Attached	Complaint	10/24/2017 1:59 PM	Completed	10/23/2017 8:0...	10/24/2017 1:5...	
Missing	Assigned to Attorney	10/24/2017 1:49 PM	Open	10/27/2017 8:0...		

### Step 4: Timecards

- 1) Enter Timecards
  - a. Enter timecards by clicking on the + button

**TIMECARDS**

**TIME TRACKING**

Category	Start Date/Time	Duration	Total Amount	Owner
Case Review	10/24/2017 2:06 PM	5.00	\$15.42	Jon Rastia
Interview	10/24/2017 12:18 PM	100.00		Jon Rastia
Case Review	10/24/2017 12:12 PM	5.00		Jon Rastia
Appointment	10/24/2017 12:00 PM	10.00		Jon Rastia
Case Review	10/24/2017 12:00 PM	5.00		Jon Rastia
Court Date	10/24/2017 11:56 AM	5.00		Jon Rastia
Case Review	10/24/2017 11:43 AM	15.00		Jon Rastia
Case Review	10/24/2017 11:23 AM	20.00		Jon Rastia
Case Review	10/24/2017 11:02 AM	5.00		Jon Rastia

Time Tracked by Category  
Active Timecards

Ave Rate \$16.09

Total Amount \$30.84

Total Time Duration 160.00

Timecards will automatically create once a user opens and reviews a case, and use the minimum time configured under Settings -> LCMS Configurations. The screen below shows the timer in the case header.

SAVE & ROUTE + NEW ARCHIVE CASE RELATED CASE RESOLVE CASE CANCEL CASE

CASE: LCMS City vs Brady Dillon

Functions

Pause

Resume

Stop

Submitted On 10/24/2017 10:11 AM

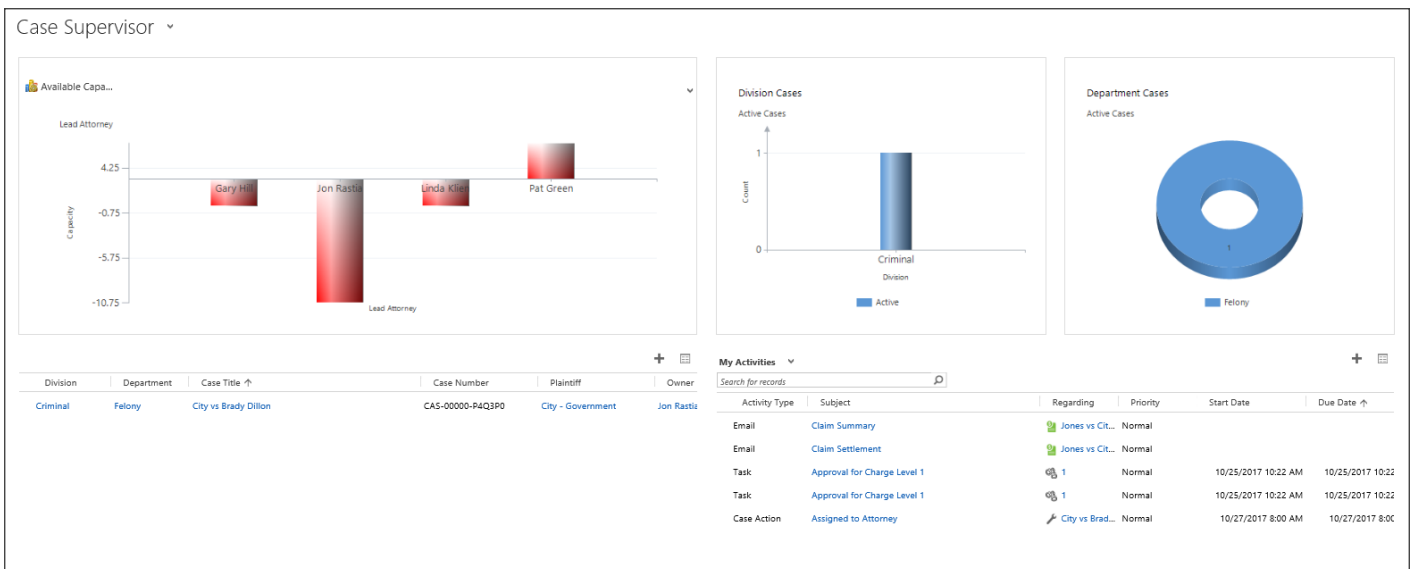
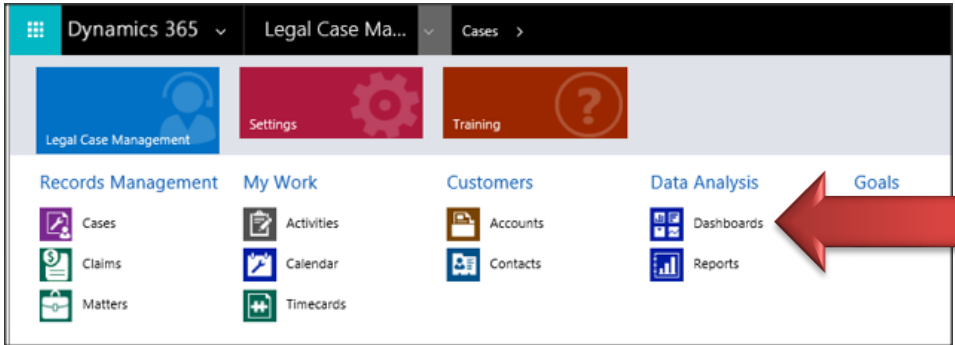
Disposition In Progress

Time Tracking 00:08:00



## Step 5: View Case Dashboard

- 1) Open Dashboards Area in LCMS
- 2) Open Case Supervisor dashboard

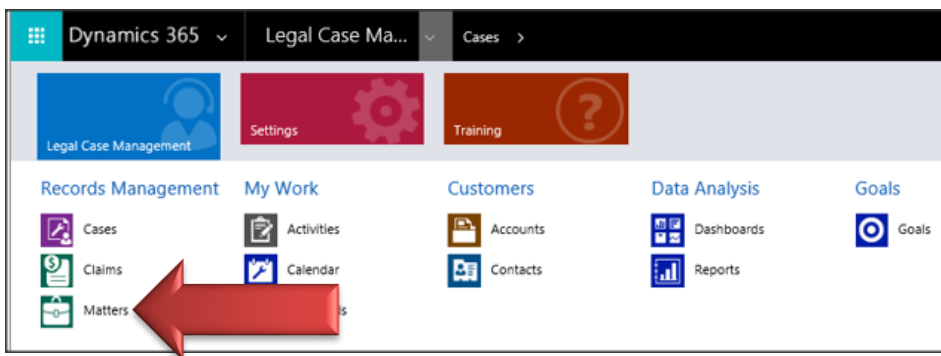


## Matter Walkthrough Scenario

Matters (projects) are managed from a single, consolidated project management screen. The project form has been pre-configured to include common data elements and activity types. The data elements included on the project form along with the activities and work-flows can be easily modified through configuration to include the relevant information and business process for each type of project that each organization manages.

This scenario will walk you through how to setup a new matters record. The final step will review the matters dashboard.

Open Matters Area in LCMS



### Step 1: Create New Matter

- 1) Enter Matter Details
- 2) Enter Agency Information
- 3) Enter Description

Chemical Safety Rule Delay Challenged in 8th... Project Lead: Jon Rastia | Est Start Date: 10/1/2017

Review (Active for 25 minutes)
Research
Revise
Execute

DETAILS		AGENCY INFORMATION															
Title*	Chemical Safety Rule Delay Challenged in 8th Circuit	Division	General Counsel	Source Agency	City Waste ACME Co.												
Type	Contract/Agreement	Department	Program Administration	Project Lead*	Jon Rastia												
Status Code	In Progress																
Est Start Date	10/1/2017																
Est End Date	11/30/2017																
PA	No																
DESCRIPTION		MATTER TEAM															
<p>Attorneys General for eleven states filed a challenge in the U.S. Circuit Court of Appeals for the District of Columbia seeking to vacate a recently announced 2-year delay in implementation of chemical safety rules. (Reuters). EPA Administrator Scott Pruitt initially announced a delay in the rule in March and then promulgated a rule modification announced in June which provides that the rule will not become effective before February, 2019. (The Hill). In the interim, the Agency will assess the rule's potential impact on businesses.</p> <p>The rule was finalized at the end of the Obama Administration and was scheduled to become effective on March 14. It was prompted principally by a chemical plant disaster in Texas in 2013, where fifteen people, including some first responders, died as a result of explosion and fire. (EHS Today). Interestingly, an EPA fact sheet issued at the time of the announcement of the delay in the rule primarily focuses on the reasons for proceeding with the rule and its potential protective benefits, noting other recent incidents at chemical plants and facilities. (EPA Fact Sheet). Nonetheless, the rule had generated substantial concern among industry officials who urged the new Administration and Congress to reject the rule outright. Congress did not act to prevent the rule from taking effect so the Administration promulgated a rule to delay implementation. It is this "delay rule" that is challenged by the recent lawsuit. The suit claims the delay is unlawful and asks the court to reverse the action pursuant to judicial review authority granted under Section 307 (d)(9) of the Clean Air Act.</p>		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Full Name ↑</th> <th>Site</th> <th>Business Unit</th> <th>Title</th> <th>Position</th> <th>Main Phone</th> </tr> </thead> <tbody> <tr> <td>Gary Hill</td> <td></td> <td>dxclcms-dev</td> <td>Attorney</td> <td></td> <td>(111) 222-0598</td> </tr> </tbody> </table>				Full Name ↑	Site	Business Unit	Title	Position	Main Phone	Gary Hill		dxclcms-dev	Attorney		(111) 222-0598
		Full Name ↑	Site	Business Unit	Title	Position	Main Phone										
Gary Hill		dxclcms-dev	Attorney		(111) 222-0598												

## Step 2: Add Participants

- 1) Enter Case Participants Plaintiff and Respondent
  - a. Enter Additional Participants by clicking on the + button

MATTER TEAM					
Full Name ↑	Site	Business Unit	Title	Position	Main Phone
Gary Hill		dxclcms-dev	Attorney		(111) 222-0598

## Step 4: View Matter Dashboard

- 1) Open Dashboards Area in LCMS
- 2) Open Matters Supervisor dashboard

The screenshot shows the Dynamics 365 navigation pane for 'Legal Case Management'. The 'Dashboards' option is highlighted with a red arrow. Other options include 'Records Management', 'My Work', 'Customers', 'Data Analysis', and 'Goals'.

The screenshot shows the 'Matters Supervisor' dashboard. It features three charts: 'Matters By Project Lead', 'Matters by Date', and 'Matters by Department'. Below the charts are two tables: 'Active Matters' and 'My Activities'.

Department	Title	Est Start Date	Est End Date	Status of Matt...
Program Admin...	Chemical Safety Rule Delay Chal...	10/1/2017	11/30/2017	In Progress

Activity Type	Subject	Regarding	Priority	Start Date	Due Date ↑
Email	Claim Summary	Jones vs Cit...	Normal		
Email	Claim Settlement	Jones vs Cit...	Normal		
Task	Approval for Charge Level 1	1	Normal	10/25/2017 10:22 AM	10/25/2017 10:22
Task	Approval for Charge Level 1	1	Normal	10/25/2017 10:22 AM	10/25/2017 10:22
Case Action	Assigned to Attorney	City vs Brad...	Normal	10/27/2017 8:00 AM	10/27/2017 8:00