



Attorney Inquiry + Notifications

The CourtAlert Case Management System features many tools to notify the attorney on deadlines and case information along with Research, Experience and KM tools.

Attorney Access

- Internal Case Snapshot Display – View case calendar and as-filed PDFs
- Advanced Case and full-text PDF search
- Staff calendar, firm-wide calendar and office/practice group calendar
- Attorney Tickler – multiple styles and automatic scheduling
- Advanced Outlook calendar integration
- Save & Notify email to case team with the PDF
- Mobile friendly inquiry module and app
- Analytics using built in reporting tools and dashboards
- Dozens of reports already built in
- Report writer to allow users to design your own reports

Deadline Reminder Alternatives

- Automated attorney tickler via email; optimized for phone display, with PDF
- Email reminders on a set schedule – include links to docket sheet and PDFs
- Automatic Outlook[®] integration – color coded deadlines

Marketing and KM

- Specially designed tools to track Firm Experience
- Individual and shared document tagging
- Knowledge Management system to highlight good work products and samples

Inquiry and Reporting

- Display of cases, deadlines, dockets and their PDFs
- Numerous standard reports – optionally emailed automatically
- Mobile friendly ticklers – designed for phone as well as print
- Report writer – customize and design your own reports and screens



Docketing + Calendaring

Quickly and accurately docket and calendar incoming filings and updates

Docketing and Document Reconciliation

CourtAlert's Patented technology automatically captures emails and PDFs and integrates them into the docketing system.

All Federal PACER Courts | State systems including NYSCEF | File&Serve | PTAB |
Case monitoring: NY, NJ, SF, LA, SD | CourtAlert Docketing app | Attorney Portal |
and more

Elegant, Accurate and Efficient

- **Avoid Mistakes**— The PDF is always available with the docket and deadlines: in the inquiry module, automated emails and via Outlook
- **Save Time**— Electronically filed cases can be docketed in seconds
- **Save Money**— Users firm-wide access the PDF image of documents on the firm's server, saving on PACER and File-and-Serve cost
- **Designed for Heavy Caseloads** in large firms with many practice areas

East and West Coast Styles – Docket first or Calendar first

- **User's Choice**— Enter your CompuLaw[®] or CalendarRules trigger first or start from a new docket. Either workflow creates a consistent calendar and docket view
- **Automatic Rules**— Integration with CompuLaw and CalendarRules.com using real-time API calculation of deadlines using automatic rules
- **Court Dates Reconciliation**— Integration with dates monitoring services that provide court calls in various courts.



Case + Matter Management

CourtAlert Case Management has hundreds of optional features that can be enabled or disabled to accommodate the specific workflow of each firm. CourtAlert frequently upgrades the software and adds many new features requested by clients.

Case Details

Matter & Case Details | Teams | Parties with Representation Classifications | Notes | Conflicts | Walls | Case Disposition

Tools

- Support for multiple cases with cloning for appeals and MDLs
- Case Lists – Configurable views with additional details and statistical information that can be easily filtered, saved and shared
- Mass Edit – Case Status and Attorney Replacements
- Entity Demographics
- Calendar review – Review the upcoming deadlines for spelling and capitalization errors. Easy calendar cleaning before going to print
- Rules Explorer and Date Calculator – Explore and report on hypothetical dates
- Custom Rules – Manage and apply Custom Rules and Firm Policy
- Admissions – Manage Attorney Admissions, ECF Credentials, CLEs and more with automatic renewal reminders
- Knowledge Management – Label and Search for KM good sample document
- Templates and Form Generation
- Many Case and Matter printed and Inquiry reports



Enterprise Integration

CourtAlert Case Management is designed to take advantage of systems already at your firm. This helps the firm maximize their investment in their infrastructure while reducing risk of double entry.

Exchange and Outlook[®]

- Deadlines are automatically pushed into Outlook using EWS
- Configurable subject, body and categories
- Removes adjourned dates automatically
- Supports Exchange 2010+ and greater and mixed environments

iManage / NetDocuments

- Document profile created automatically with text of the docket.
- Matter Centric with subfolders
- Full Text Search of the documents

Wall Builder

- Inclusionary and Exclusionary walls
- Integrate with Intapp WallBuilder

And more

Marketing Information

Document Upload Portal

Templates and Form Generation

Full Audit control

- Change history on every data element

Data Security

- On-Premises system
- SSO and Active directory integration
- Role-based module authorization Conflicts
- Conflict reporting and data feed option

Rules Vendors CompuLaw[®] and CalendarRules

- Calculate deadlines with real-time rules applied using API technology with our Rules Vendor Partners

Accounting

- Elite[®] and other accounting integration of Client Matter codes and descriptions

Human Resources

- HR data feed to automatically manage staff updates
- Staff termination workflow to remove and report terminated staff



Risk Management

CourtAlert Case Management was designed with the primary purpose of reducing risk at the firm by automating data feeds and reporting. From Court Notices and Automatic Rule to Attorney management and Accounting – Automation and a simple workflow reduces errors and missed deadlines. Many reporting options ensure everyone is informed.

- Centralized docketing and calendaring for optimal risk management by docketing staff across the firm
- Automatic rule by CompuLaw[®] or CalendarRules updated in real time
- Many deadlines notifications – Outlook, Attorney Tickler and Firm-wide Calendar, Reminder Emails and interactive Inquiry module

Audit and Quality Control

System-wide full audit – recording of each field that was changed, by whom and when, with no system degradation. Reports on diary and docket change history

Data Conversion

Data Conversion, Data cleansing and initial training are typically covered by the allotted hours in the License Fee.

Client Satisfaction

We encourage you to contact one of the many firms already using CourtAlert Case Management to discuss their satisfaction with the software, CourtAlert service, and our commitment to continued enhancements. CourtAlert is committed to complete client satisfaction. That is the principal that has guided our company along our journey and remains our goal today