This workshop was held at the 2018 Equal Justice Conference in San Diego, California.

Title:
Automated workflow: A legal helpline case study

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This helpline case study will explore how a dynamic case management system can allow legal aid providers to automate workflow (no coding required), integrate with other services like auto generated follow up texts, collaborate with partners inside and outside your organization and improve analytics through artificial intelligence embedded applications
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Automated Workflow: A Helpline Case Study
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Brief Description: This helpline case study will explore how a dynamic case management system allows legal aid providers to automate workflow (with no coding required), integrate with other software, collaborate with partners inside and external to your organization and improve analytics through artificial intelligence embedded applications.

Program Goals (what you will learn):

1. Participants will explore a dynamic case management tool through the experience of a user and through the experience of a tech expert. The case study will include discussion of how the platform facilitates collaboration internally and externally.

2. TALS’ helpline case study will provide a concrete example of how automating workflow drives internal operational efficiencies, expanding the reach of legal services and enabling customized follow up with clients and partners.

3. Participants will learn how AI enabled applications can improve analytics through a discussion of potential uses and through a demo of TALS’ dashboard.

Topical Outline:

I. Introduction of case study
   a. TALS’ mission and helpline workflow

   b. Data based decision to automate workflow
II. Automation Project
   a. Selection and implementation of case management system
      i. Creating and automating helpline workflow in CMS
      ii. Outsourcing helpline intake using CMS
      iii. Interoperability - integration of texting software
      iv. Multi Stakeholder workflows - assigning cases to staff and to outside attorneys
      v. Efficiencies gained through customized dashboards and reporting

III. AI and Use Cases for Platform
    a. Discussion of how AI embedded apps can improve analytics
    b. Interactive discussion of potential use cases for platform

IV. Lessons Learned through automation project

Notes:

Bibliography & Website Links:

1. www.HELP4TN.org

2. ask.kim.com

3.

Please submit outlines no later than April 6, 2018 to ejcmaterials@nlada.org.