

ELM Solutions

*Passport® Collaboration Module*Key
Benefits

- Enhances communication between legal or claims professionals and their counsel
- Efficiently captures and standardizes data from legal service providers
- Maximizes control over data integrity and security
- Streamlines key collaborative business processes from end-to-end
- Enhances reporting and analysis with richer, more consistent data

“...supports true collaboration between corporate legal or claims departments and their legal service providers...”

ELM Solutions understands the business needs that underlie the exchange of timekeeper, accrual, budget, and matter status-related data with legal service providers. With these needs in mind, ELM Solutions has designed unique collaborative tools that not only streamline the capture of this data, but also provide clients with:

- End-to-end support for key collaborative business processes
- Maximum control over data integrity
- Richer data for analysis and reporting

The Passport Collaboration Module excels beyond basic delegation of data entry to law firms. Clients are able to collaborate with their legal service providers on a range of processes, including budgets, matter status updates and narratives, timekeeper rates and information, and accruals. Collaboration takes place in the patented Passport Collaboration Portal, which is a secure pipeline that uses advanced technologies for transmission of data between companies and their legal service providers. The Collaboration Module provides support for several vital collaborative processes including:

Timekeeper Collaboration – Take control of cumbersome timekeeper rate reviews and more effectively evaluate legal service providers.

- Manage the exchange of timekeeper data from start to finish, including annual rate review processes
- Initiate bulk rate requests, route submitted rates for review and approval, evaluate rates against historical data, upload timekeeper data in the client’s specified format, and communicate rate decisions to legal service providers
- Enforce the consistent capture of desired timekeeper data across all legal service providers with the use of standardized templates (i.e. rate, classification, demographics, education, expertise)
- Enable more effective timekeeper evaluation, peer group analysis, and rate negotiations through the capture of enhanced timekeeper data

Passport® Collaboration Module

Budget Collaboration – Expedite budget creation and improve spend predictability.

- Streamline the request, receipt, and review of matter budgets from legal service providers
- Capture monthly, quarterly, yearly, fee/expense, phase, and life-of-matter budgets to enhance planning and spend management capabilities and support firm performance evaluations
- Request budget updates throughout the life of a matter to avoid surprise variances

Accruals Collaboration – Gain enhanced visibility into departmental cash flows, improve forecasting, support corporate compliance with SOX and other financial reporting requirements.

- Easily request, receive, review, and report on work-in-progress estimates for fees/expenses from legal service providers
- Receive estimates for multiple matters – the bulk download/upload capabilities make the process simple for service providers
- Automatically send routine monthly/quarterly accruals requests to specific legal service providers via the scheduling feature

Matter Management Collaboration – Provides the ability to collaborate on matter-related information efficiently and securely with your legal service providers.

- Request updates on matter summary details, narratives, and documents
- Specify private matters for collaboration using the Secured External Person role feature
- View collaborative matter document submissions from a law firm via the Collaborated Matter Updates page

Diversity Collaboration – Provides a comprehensive view of law firm diversity data.

- Tracks organization and timekeeper level diversity information: gender, minority status, NAMWOLF status, LGBTQ status, disabled, veteran, etc.
- Client-customizable data fields allow for internal nomenclature and diversity tracking
- Includes pre-built reports and metrics displaying diversity trend data over time

With the Passport Collaboration Module, corporate legal and claims departments move beyond delegation and are empowered to streamline their collaborative business processes from end-to-end, maximize control over their data, and enhance their relationships with legal service providers.

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