ELM Solutions

CT Corporation Service of Process Connector for Passport®
An ELM Solutions Partner Program Offering

Connector Benefits

- Streamlines, centralizes, and standardizes the intake of SOP documents for timely review and easy management

- Reduces the complexity and risk of SOP intake and processing

- Captures a full audit trail of SOP handling for reporting and visibility

"The CT SOP Connector enables comprehensive management of service of process, including the ability to receive, triage, and store electronic SOP documents..."

The management of incoming service of process (SOP) is often cumbersome and time-consuming for legal staff, with the potential for significant exposure if a key deadline is missed. The CT Corporation Service of Process Connector for Passport (CT SOP Connector) mitigates this risk by ensuring that all legal notices are routed for timely review and response. This helps safeguard against missed deadlines and also minimizes manual processing by staff. The CT SOP Connector enables comprehensive management of service of process, including the ability to receive, triage, and store electronic SOP documents from the CT Registered Agent service directly within Passport applications. Key features provided by this connector include:

Transfer of service of process documents from CT's Registered Agent service to Passport.
- Passport automatically requests new service of process documents from CT daily; clients can customize the frequency of this retrieval schedule to suit their business processes
- Outside of any scheduled retrieval job(s), the client's SOP Coordinator(s) can manually retrieve specific SOP documents or download all new SOP documents from CT at any time

Centralized intake, triage, and ongoing management of service of process.
- SOP documents received in hardcopy format (e.g., mail, overnight courier, fax) can also be scanned and manually entered into Passport to support a centralized view of all SOP records
- Upon receipt of a new SOP record, the client's SOP Coordinator(s) have the ability to:
  - Quickly search all existing matter records for a potential match
  - Associate the SOP record with an existing matter, with the ability to relate the SOP document attachment(s) to the matter record and notify the responsible professional of the document receipt
  - Create a new matter using a matter creation wizard that is pre-populated with data from the SOP record; the SOP document attachment(s) are added to the new matter and, if desired, a new matter notification can be sent to the responsible professional
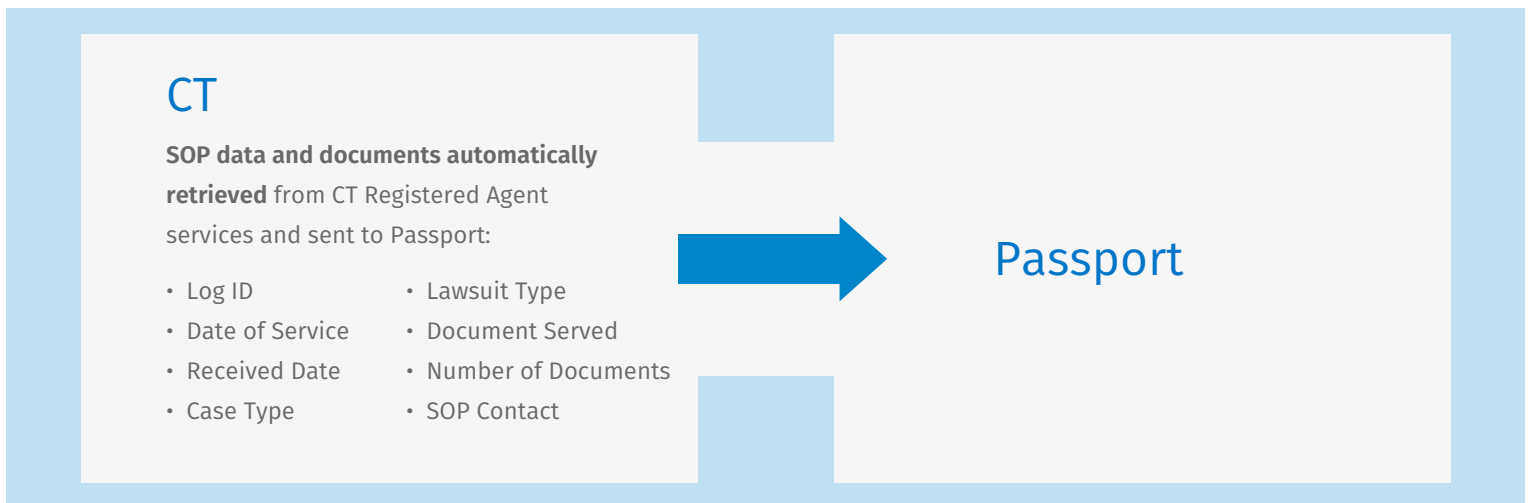
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- Forward the SOP document to another department (e.g., a wage garnishment request that should be sent to HR) and retain an SOP record in Passport for audit and reporting purposes
  - Close the SOP record without taking action and retain an SOP record in Passport for audit and reporting purposes.
- Clients have the option to store SOP document attachments in the Passport document management component or in a third-party document management system
- SOP Coordinator(s) are also able to:
  - Update the SOP contact name and status, plus add SOP comments to support management of each SOP record
  - View the docket history of an SOP record to see related SOP documents that were previously received
  - Search across all SOP records and their related matters
- All changes made to SOP records are logged and reportable in Passport

Display and reporting of SOP information within Passport.
- A Passport homepage dashboard for the SOP Coordinator(s) includes all new and "in review" SOP documents for quick and easy review and access
- SOP Coordinators and SOP Managers are able to view SOP summary information and documents on a matter record;
- Passport end users are simply able to view the SOP documents
- The CT SOP Connector includes two SOP coordinator views: SOP Received by Date of Service and Service of Process - In Process
- All SOP fields that are received from CT and stored in the Passport database (including data that may not be visible in the
- Passport user interface) can be included in reporting and analytics generated using the Passport business intelligence engine

CT

SOP data and documents automatically retrieved from CT Registered Agent services and sent to Passport:

- Log ID
- Date of Service
- Received Date
- Case Type
- Lawsuit Type
- Document Served
- Number of Documents
- SOP Contact

Passport

The CT SOP Connector automates and streamlines SOP intake and management.

When you have to be right