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CaseMap for Solos

Yesterday, I met with a CaseMap representative and he walked me through the program. Needless to say, it appears to be a very robust and impressive piece of software. One question the rep could not answer was 'how many solos use Casemap and input the data themselves'? Based on what the rep showed me, it looks like inputting the data would be pretty time-consuming. Do any solos in the "firm" have experience using CaseMap and who insert the case data themselves? I'm interested in others' experiences before I make such a substantial investment. Any suggestions are appreciated.

Barry S. Hersh

I'm a solo without any staff, so, of necessity, I put info into CaseMap myself.

As with any database program, you need to plan things out first. It has sample databases you can play with; you can create templates that can form the basis for your working files. This gives you the change to play around with your default setups. For me, these default settings change by the type of case. I will want different types of identification information and connecting terminology for civil and criminal cases, for example.

I think that they still offer free training over the phone (at least they used to) and there are many samples and templates available developed by user-attorneys. Plus, it may be one of the most responsive listservs for legal software.

Barry Lippitt

I'm a solo with two paralegals and a p/t bookkeeper. But I do all the inputting myself. Why? Because it forces the discipline of organizing each case, from the gitgo.

I have been a CM user since version 1.0. It may be the BEST single software package I've ever used, at least for litigation support.

Like all other software, there's a slight learning curve, but their tech support is very good, and you can be up and running with your first case in two hours or less.

Barry S. Hersh

I, too, am a solo with paralegals and I agree with Charlie that CM may be



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the best litigation support package on the market. I do a lot of the input myself since it is the equivalent of thinking about the case and making notes of thoughts, theories, questions, etc., but I do have the paralegals do input of all of the supplemental detail that can be entered (addresses, phone numbers, dispute/undisputed, etc.) and a lot of document review, flagging the documents that I should review in detail myself.

Alan L. Inglis

I don't have paralegals either and so enter info into CM myownself. It helps me get rid of the legal pad notes and have my notes organized in such a way as to use them in various formats and sorts.

It does facilitate thinkng about the case, its issues, cast of characters, etc. in an organized fashion.

It makes putting together a brief and supporting affidavits much less painful by relieving a great deal of the tedium.

Robert B. Walker

Do they allow a free trial period of the program? Does it come with support?

Meyer Silber

For those of you who put the data in yourselves, do you charge clients for this time? If so, at your attorney rate or some other?

Barry S. Hersh

Depends on the type of case, of course; not for contingent fee matters; usually for hourly fee matters (I track my time on all cases, no matter the type of fee). If its original data entry, usually; if I could have done it when doing other stuff (or maybe should have), perhaps not.

Barry Lippitt

is this program useful for simpler cases or only for complex matters?

Meyer Silber

Its useful for any case where you need to track people, places, things, and issues and discovery, and relate them among each other. I use it with simple cases and not-so-simple cases.

You will get out of it what you put into it.

Barry Lippitt

Useful (and we DO use it) for cases of all sizes.

FWIW...

Alan L. Inglis

I too am a CaseMap user. I do all the input but have contemplated allowing my legal assistant to do some of the work.

What I find is that I usually turn to CaseMap and the other products in the suite when I am about to begin trial. I understand that this is far too late to begin entering information, and therefore I need to correct this habit. I tried exploring with the CaseMap folks the issue of how to integrate this program into one's practice.

So, how do other CaseMap users use the program?

Alan, you state that you use it for all cases. Do you use it during the initial client intake? How often do you update information? What about general notes that may be taken on a legal pad or within a word processing program? Do you use it for this kind of stuff or do you use NoteMap?

Michael D. Day

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