CINcompass®

CONNECTION

News, Updates, & Useful Tips for CINcompass Users

October 2013

Important Note: CINcompass was recently updated to reflect the revised Administrative Expense Multipliers for six districts in Alabama and North Carolina effective 10/1/13. Detailed information regarding this update can be found in the CINcompass release notes. Or get information from the Department of Justice regarding these changes.
In the October issue of CINcompass Connection, you will discover the importance of integrating your Court Notices with your matters and how to easily get set up. Also showcased is the Online Scheduling and Client Intake functionality, which allows your firm to take appointments online and streamlines the new client process.

We hope you benefit from this issue of CINcompass Connection and would love to know what suggestions you have for upcoming topics. Please send your feedback and comments to connection@cincompass.com.

In This Issue

Introduction to Court Notice Integration

In this section you will discover how to:

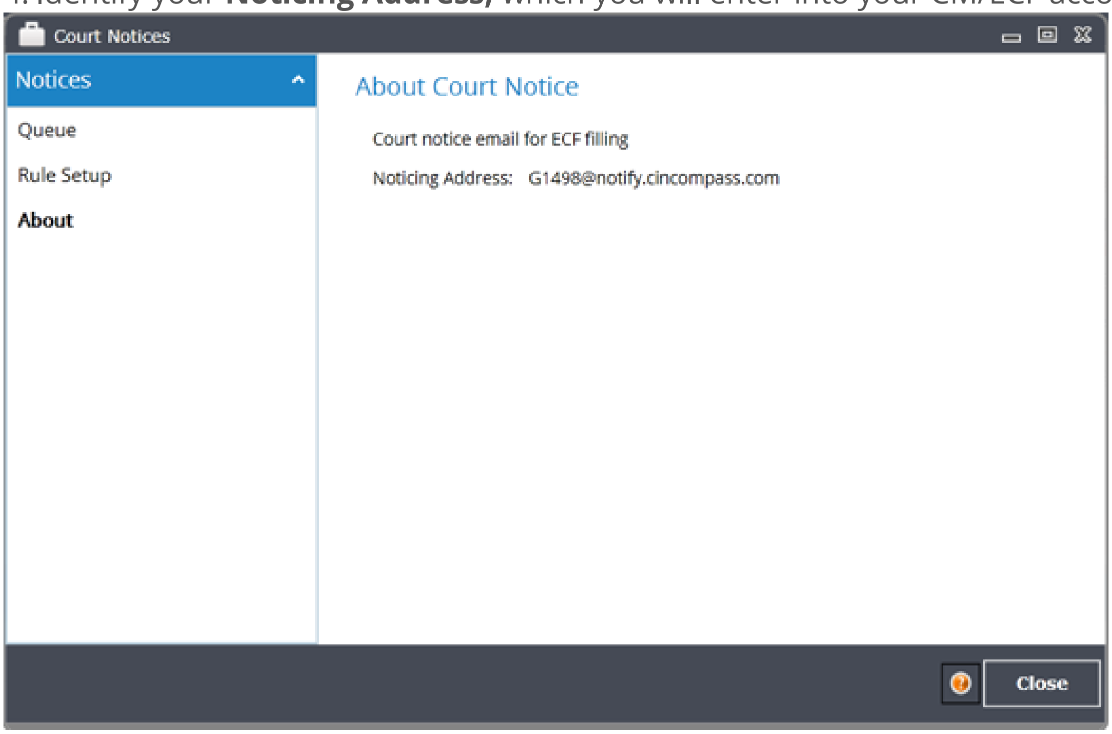
1. Save time and money by auto-incorporating your free looks with your matters
2. Auto-schedule your Court dates to ensure you never miss a deadline

Integrate Court Notices with your CINcompass account

Do you find yourself or your staff making unnecessary trips to PACER costing your firm time and money? Now you can eliminate this by automatically integrating your notices with your matters in CINcompass.

Step 1: Identify your Noticing Email in CINcompass

1. In CINcompass click the **Admin Tool** 
2. Select **Court Notices**
3. Click on the **About** tab
4. Identify your **Noticing Address,** which you will enter into your CM/ECF account



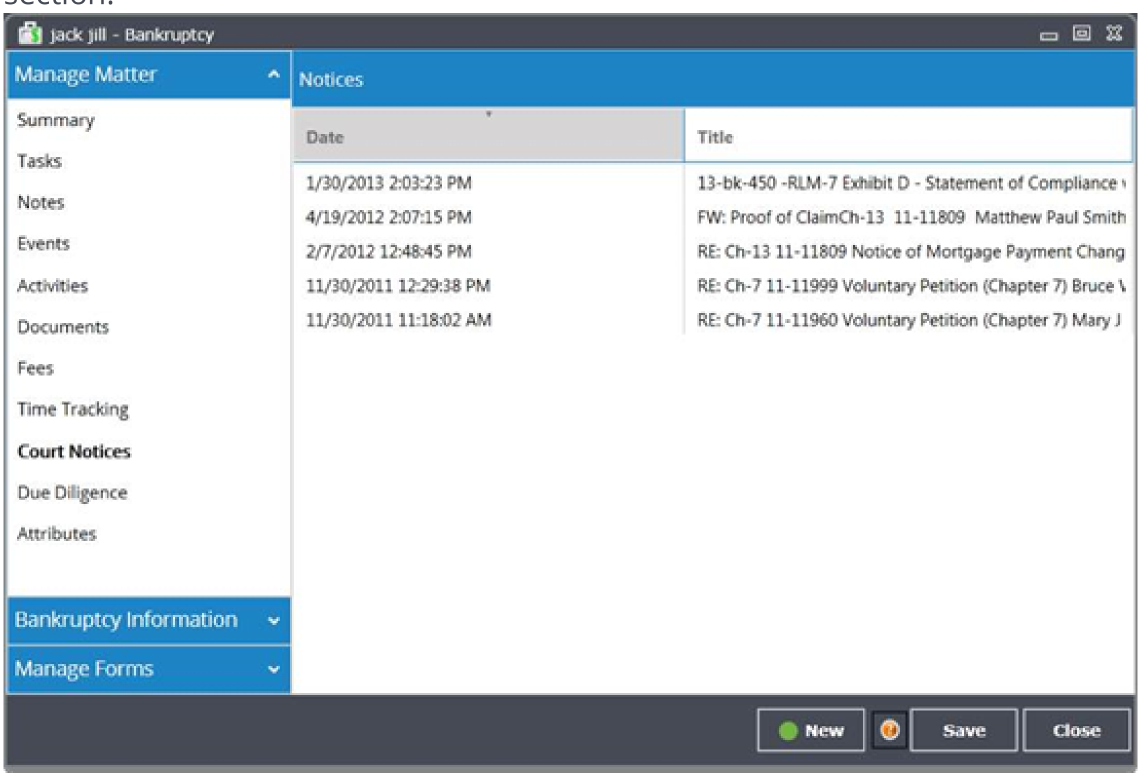
Step 2: Update your CM/ECF account

1. Sign in to the court's CM/ECF website
2. Go to Utilities
3. Choose Maintain your ECF Account
4. Click Email Information
5. Add your CINcompass Noticing email address as a secondary address
6. Check to send to secondary address
7. Select Send notices in cases in which I am involved
8. Select Send a Notice for each filing
9. The format must be in HTML
10. Submit changes and log out

NOTE: Depending on your district you may need to contact your Court to add the secondary email account.

View the Managing Court Notices video tutorial

To access Notices for a matter, open the **Court Notices** tab in the Manage Matter section.

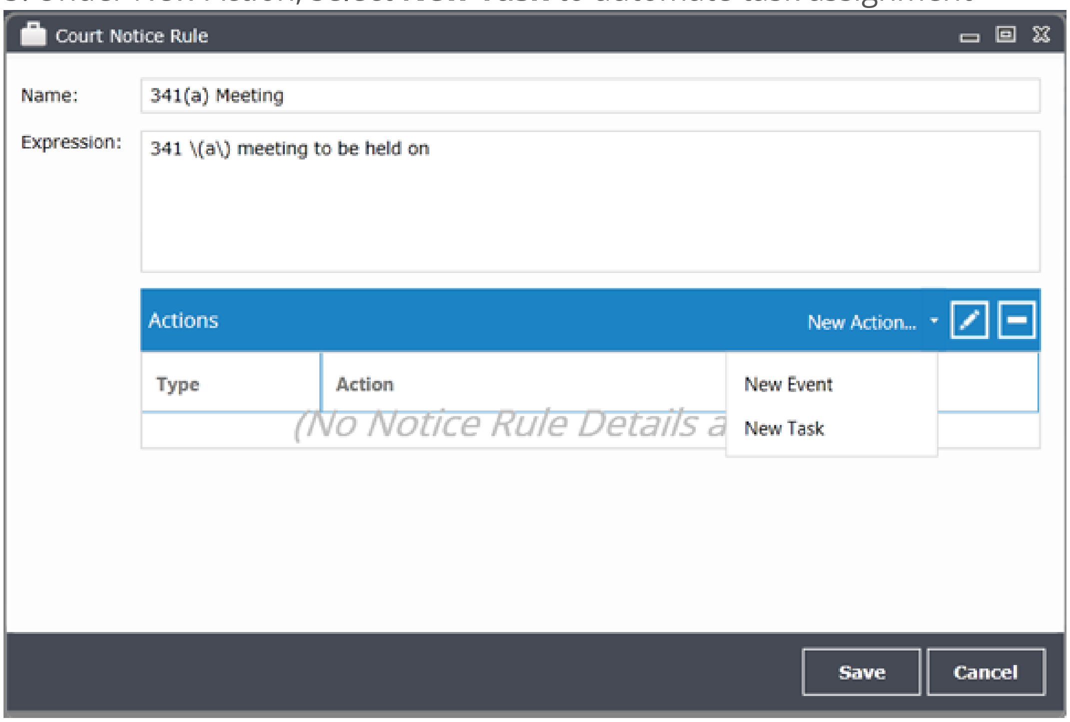


Auto-schedule your Court Dates

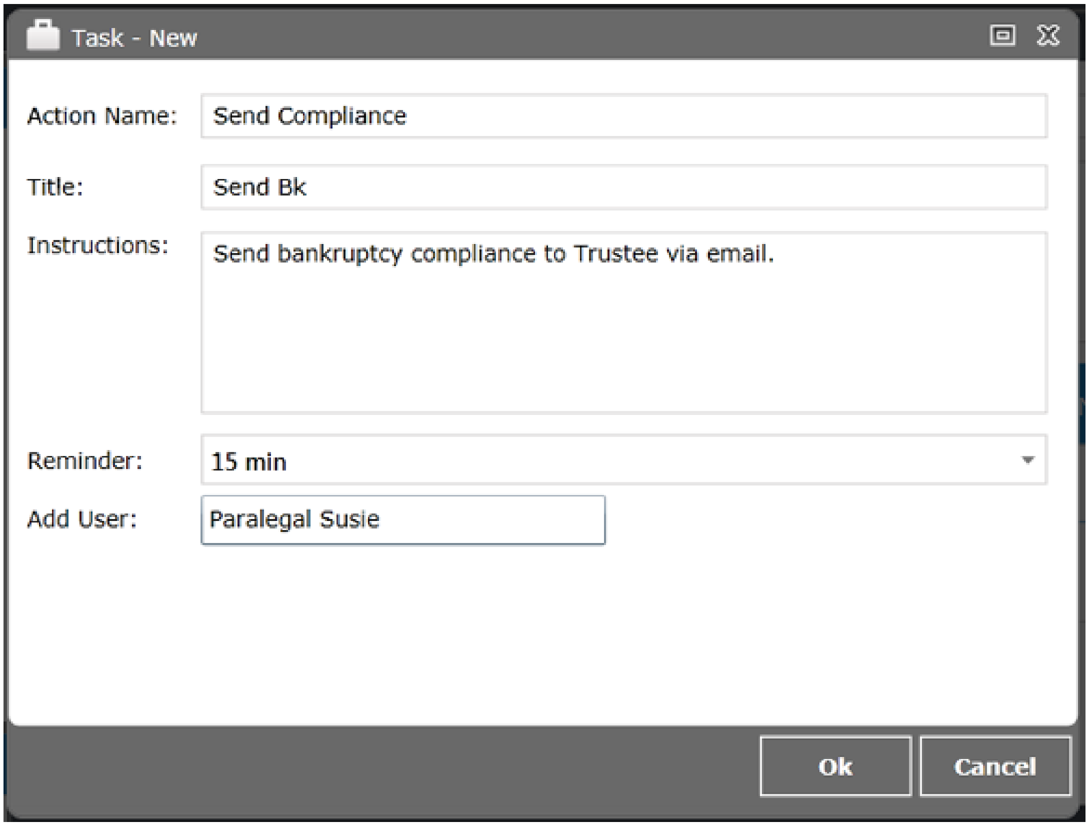
Imagine having a 341 meeting automatically populate your calendar. By setting up a Court Notice Rule you can ensure you don't miss an upcoming important date or deadline.

To Setup Court Notices Rules:

1. Under the Admin Tool , select **Court Notices**
2. Click on the **Rule Setup** tab
3. Select an office Location (if applicable)
4. Double-click on the Court Notice you wish to add a Rule for
5. Under New Action, select **New Task** to automate task assignment

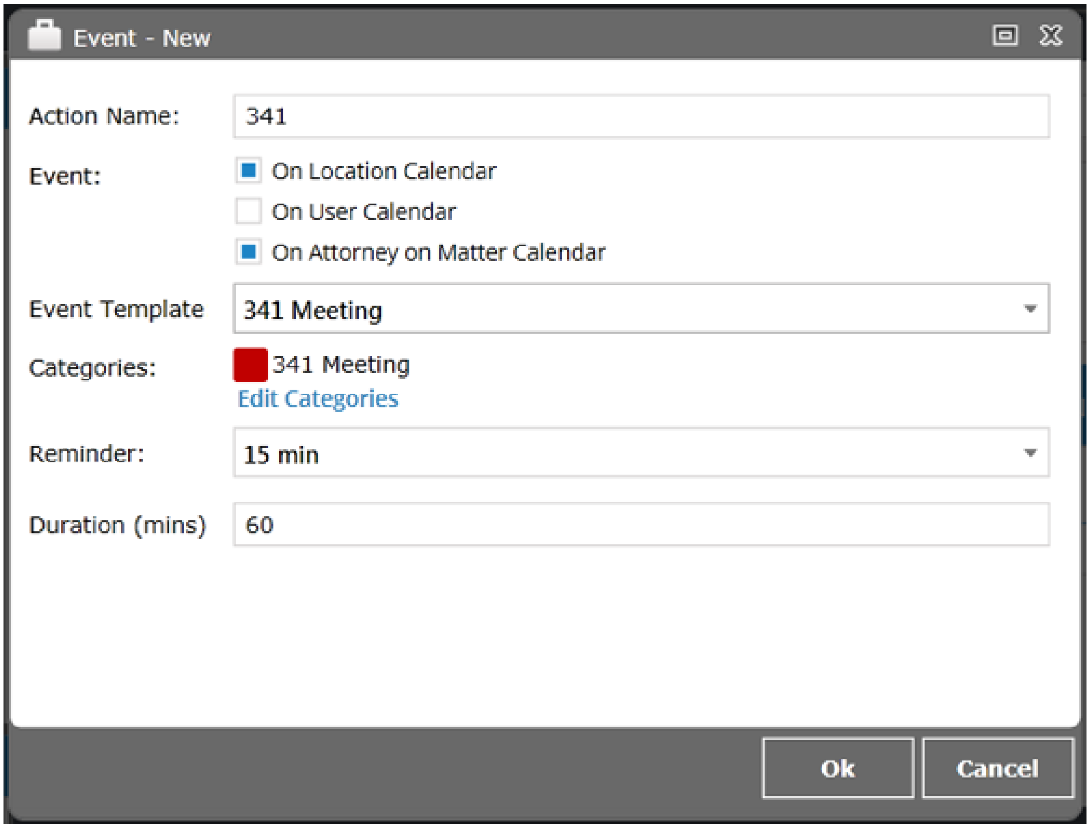


6. Enter the Task Details



Note: Now each time this Court Notice is received, CINcompass will assign this Task to the specified User.

7. Under New Action, select **New Event** to auto-schedule the court date
8. Enter the Event Details



Note: Now each time this Court Notice is received, CINcompass will schedule the court date on the designated calendar(s).

Online Scheduling and Client Intake Tools

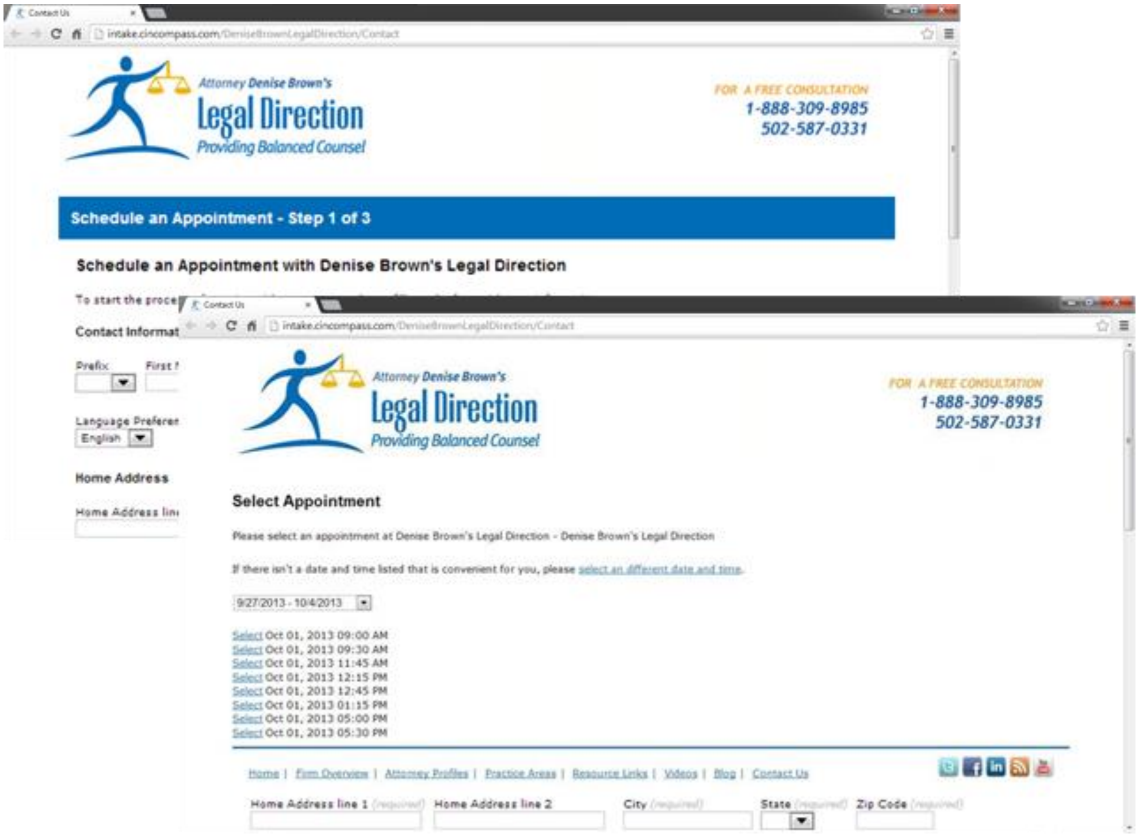
Imagine offering the ability for potential clients to schedule their own appointments with you via your website. With CINcompass you can integrate your website to your matters. Simply create an online intake form and configure auto-communications that will inform your potential clients about what to bring to the initial meeting and more. See how your firm can grow with the Online Scheduling and Client Intake functionality with CINcompass.

Configure your website and setup appointment time blocks:

Identify a block of appointment times for potential clients to schedule. Then let CINcompass do the rest.

"Potential clients can schedule their own appointments and receive reminders via email, phone and text."

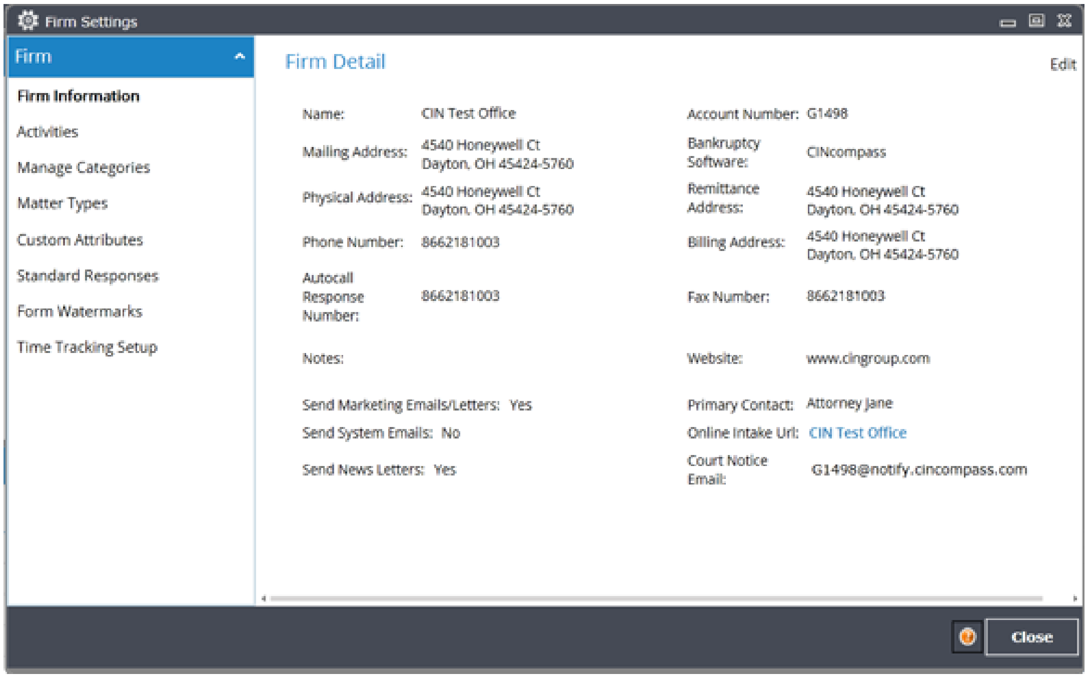
- Denise Brown, Attorney, Louisville, Kentucky



Attorney Denise Brown's custom Online Intake form, provided by CINcompass.

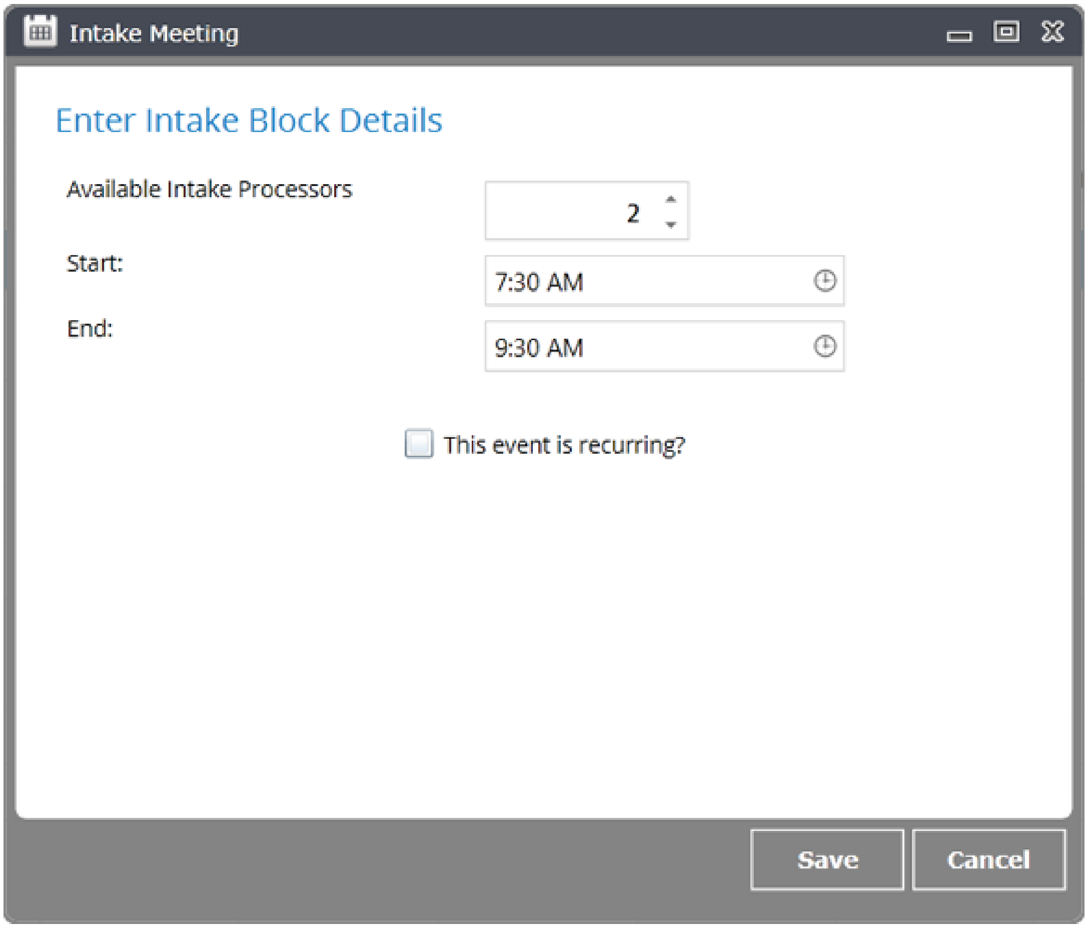
Step 1: Configure Online Scheduling

1. In CINcompass click the **Admin Tool** 
2. Select **Firm Settings**
3. Click on your **Online Intake URL**
4. [Add the URL](Add the URL) to your Firm's website.



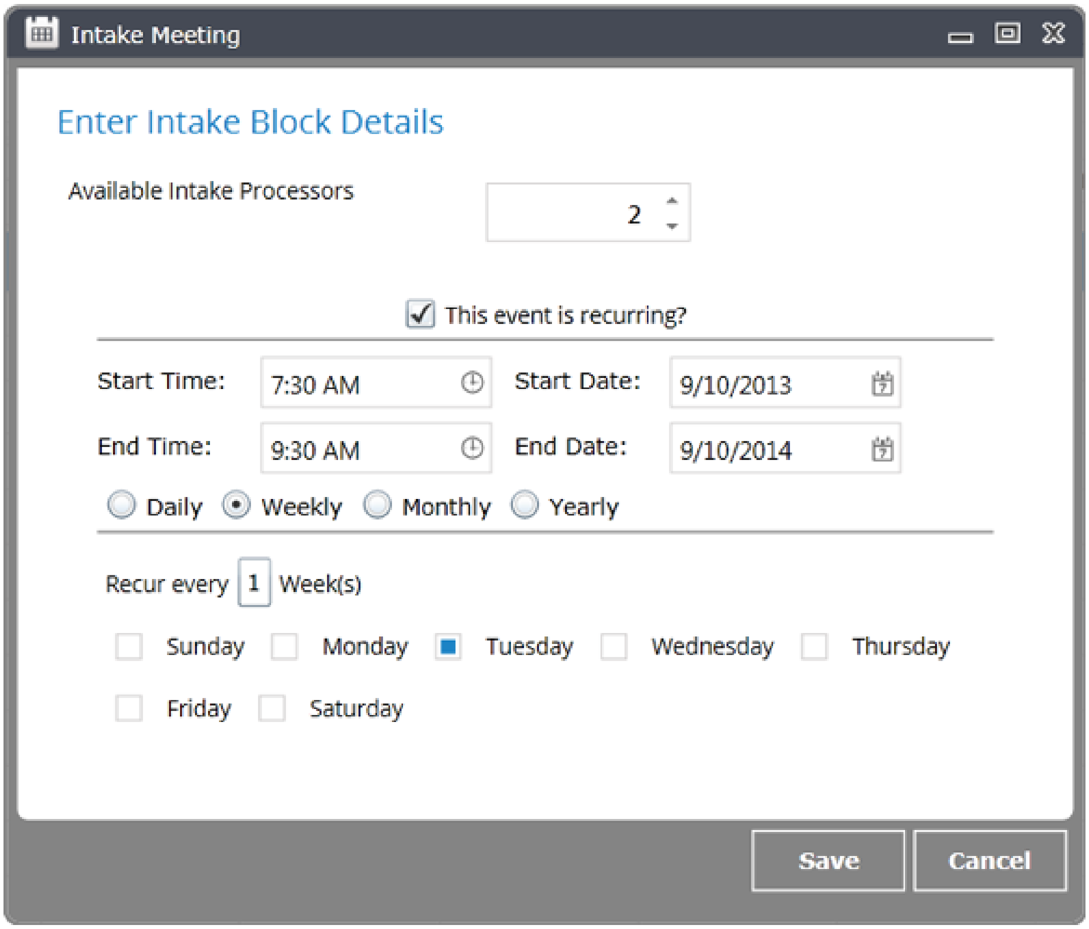
Step 2: Setup Appointment Time Blocks

1. In CINcompass click the **Admin Tool** 
2. Select **Intake Meeting Settings**
3. Double-click on a time to reserve that **Time Block**

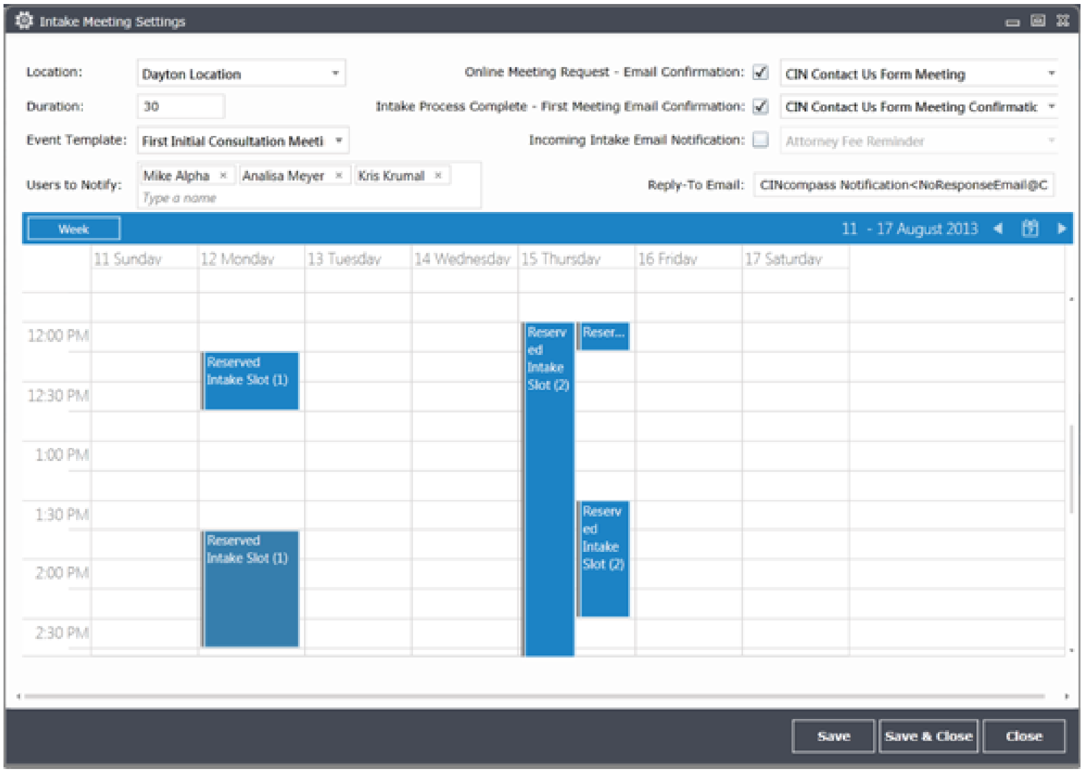


4. Select **Available Intake Processors**
5. Choose a **Start** and **End Time**
6. If you wish to make this Time Block **recurring**, check the box
Additional selections will appear

7. Click **Save** when finished



8. Repeat until you have reserved the desired Time Blocks



Now your clients can only choose from the meeting times you have blocked off here

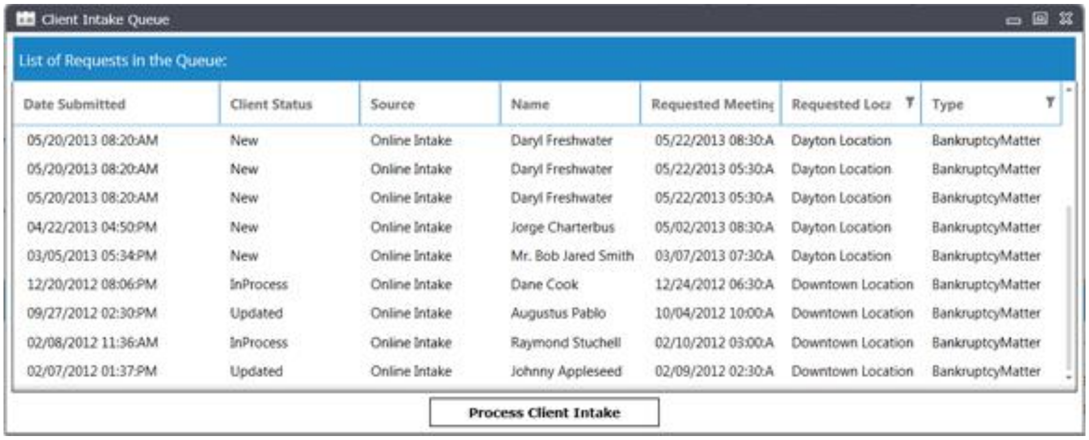
Need some additional help? Watch a video on [Intake Meeting Settings](#).

Process Client Intake

Eliminate data entry steps and automate the setup of a new client when they complete the online intake form on your website. CINcompass will take the information the client provided and process the new client.

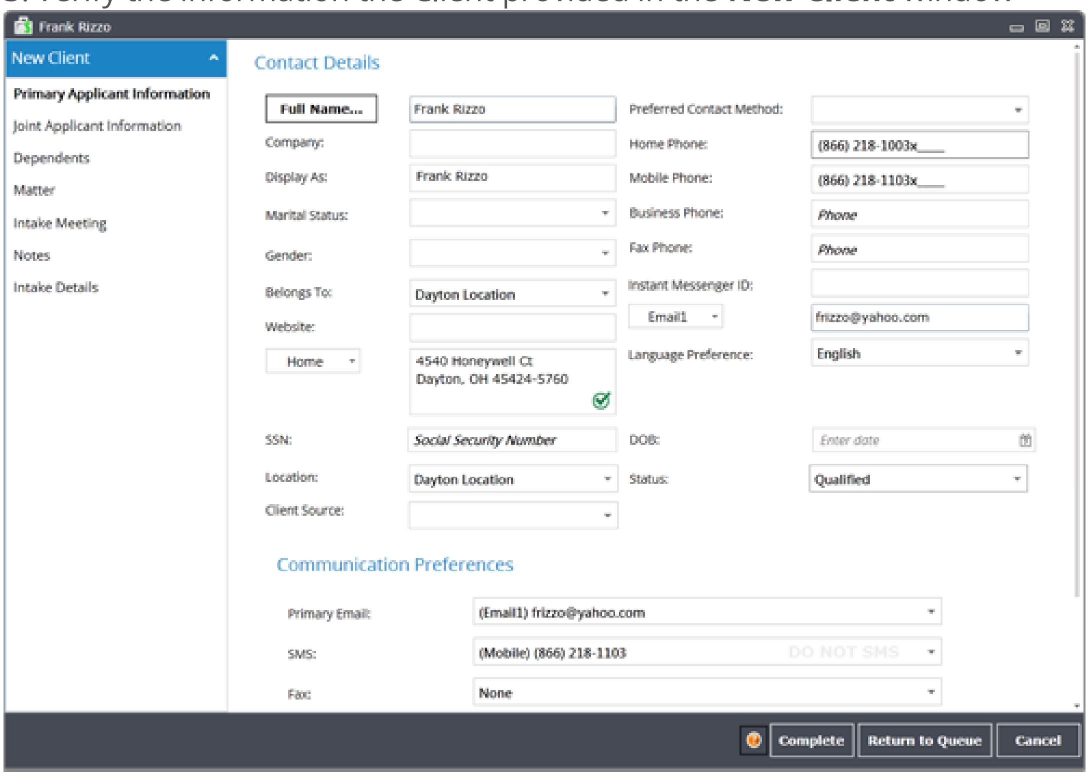
To process a Client Intake Request:

1. Click the  notification, or select **Manage Intake Queue** under the Admin Tool 
2. Double-click on a request to process

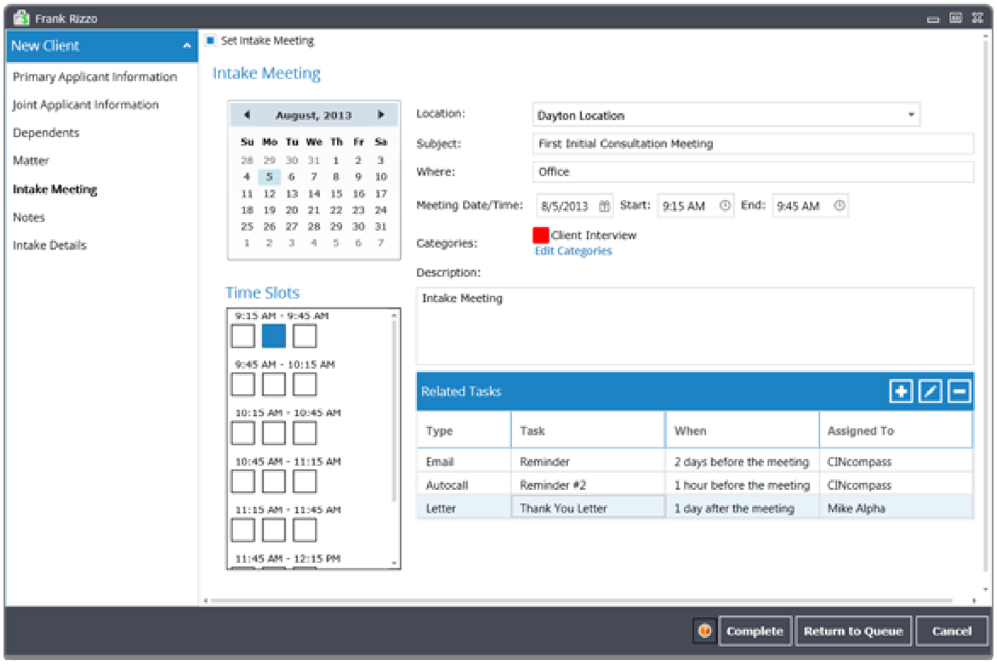


Date Submitted	Client Status	Source	Name	Requested Meeting	Requested Loca	Type
05/20/2013 08:20:AM	New	Online Intake	Daryl Freshwater	05/22/2013 08:30:A	Dayton Location	BankruptcyMatter
05/20/2013 08:20:AM	New	Online Intake	Daryl Freshwater	05/22/2013 05:30:A	Dayton Location	BankruptcyMatter
05/20/2013 08:20:AM	New	Online Intake	Daryl Freshwater	05/22/2013 05:30:A	Dayton Location	BankruptcyMatter
04/22/2013 04:50:PM	New	Online Intake	Jorge Charterbus	05/02/2013 08:30:A	Dayton Location	BankruptcyMatter
03/05/2013 05:34:PM	New	Online Intake	Mr. Bob Jared Smith	03/07/2013 07:30:A	Dayton Location	BankruptcyMatter
12/20/2012 08:06:PM	InProcess	Online Intake	Dane Cook	12/24/2012 06:30:A	Downtown Location	BankruptcyMatter
09/27/2012 02:30:PM	Updated	Online Intake	Augustus Pablo	10/04/2012 10:00:A	Downtown Location	BankruptcyMatter
02/08/2012 11:36:AM	InProcess	Online Intake	Raymond Stuchell	02/10/2012 03:00:A	Downtown Location	BankruptcyMatter
02/07/2012 01:37:PM	Updated	Online Intake	Johnny Appleseed	02/09/2012 02:30:A	Downtown Location	BankruptcyMatter

3. Verify the information the Client provided in the **New Client** window



4. Go to the **Intake Meeting** tab
5. Choose a different **Time Slot** if necessary
6. Review the Event's **Related Tasks**
7. Select **Complete** to create the *New Client* and *Matter*
8. Select **Return to Queue** to return the request to the Intake Queue

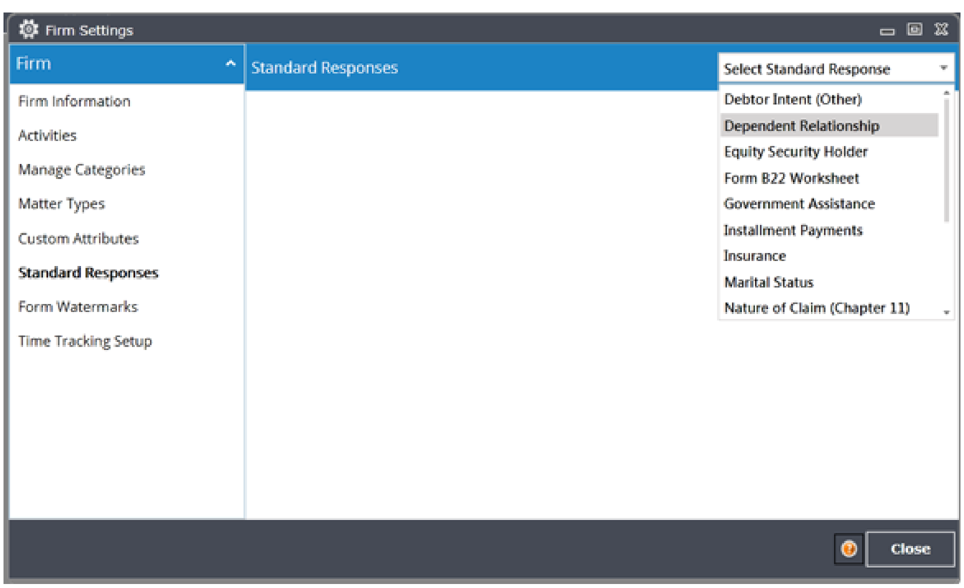


Did you know?

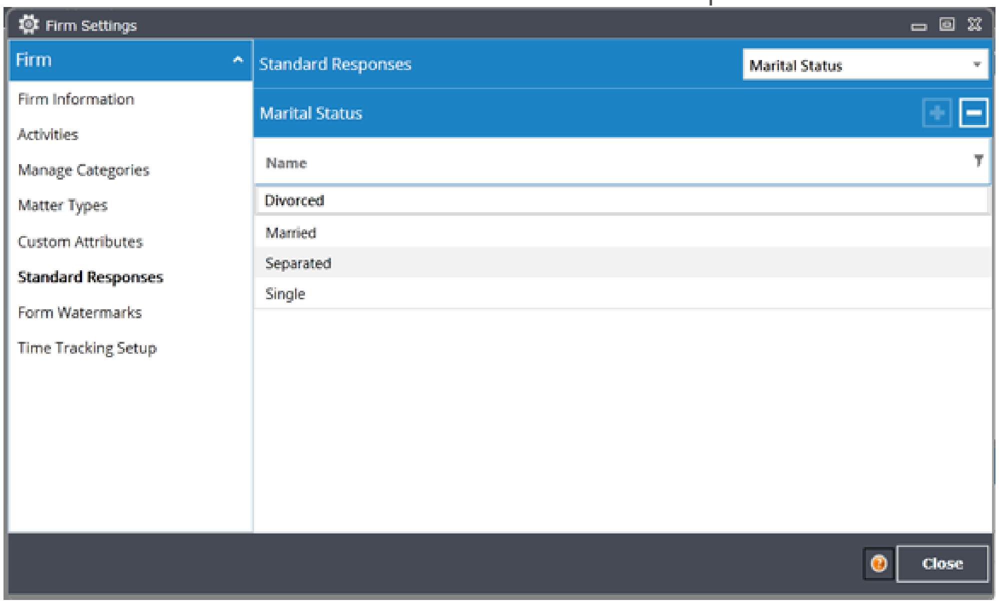
Save data entry time when preparing a petition by using CINcompass Standard Responses.

To add Standard Responses for your Firm:

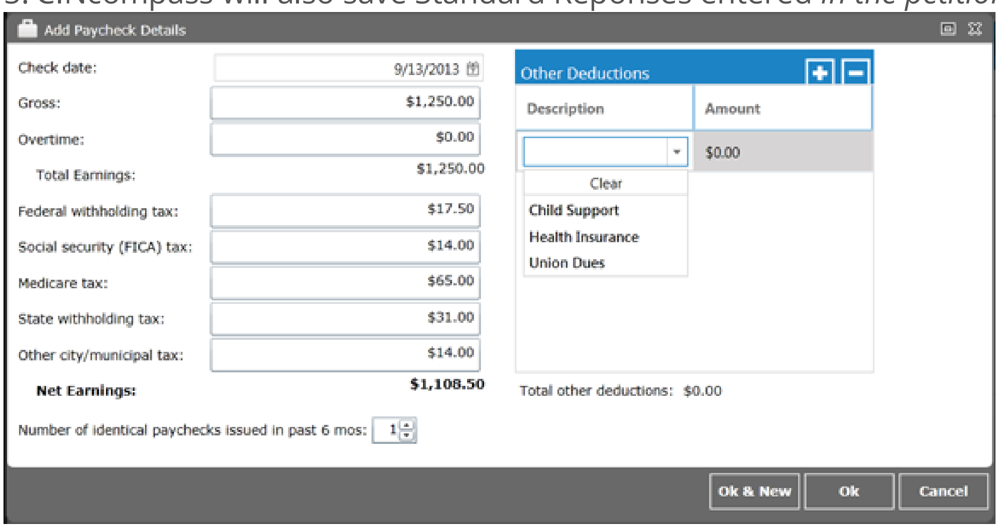
1. Under the Admin Tool, select **Firm Settings**
2. Click on the **Standard Responses** tab
3. Select the Standard Response category



4. Use the **Add** button to add a new Standard Response



5. CINcompass will also save Standard Reponses entered *in the petition*



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