

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

Court Notice Integration

Online Scheduling/Client Intake

Did You Know: Standard Responses

Introduction to Court Notice Integration


In this section you will discover how to:

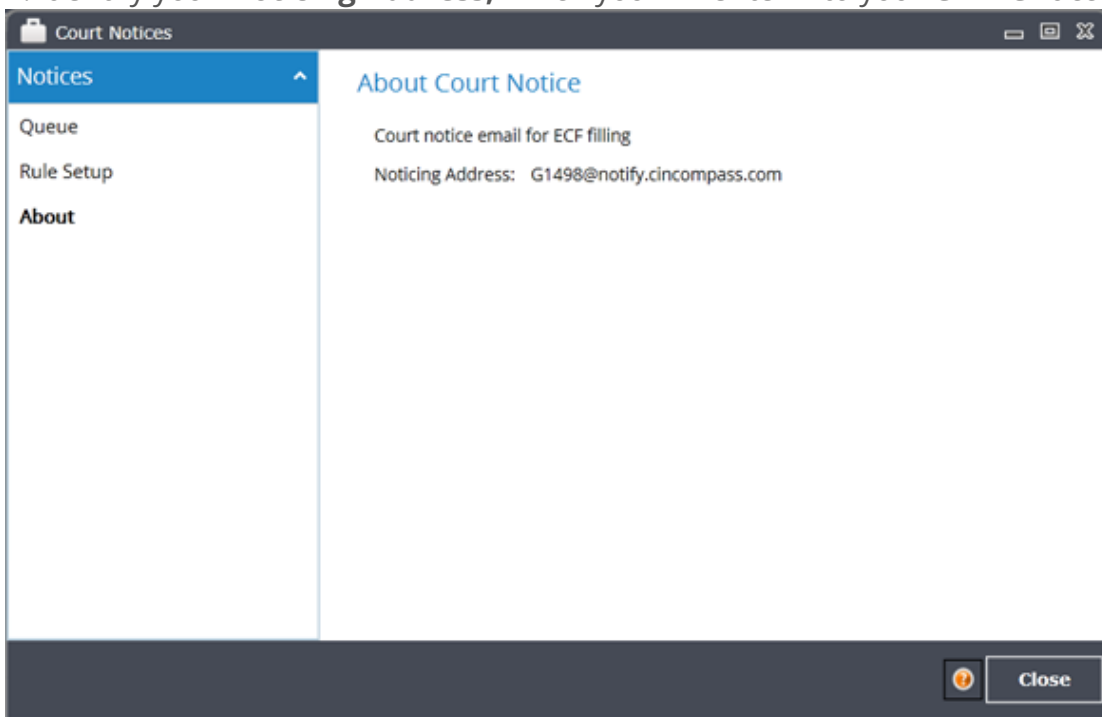
1. Save time and money by auto-incorporating your free looks with your matters
2. Auto-schedule your Court dates to ensure you never miss a deadline

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.

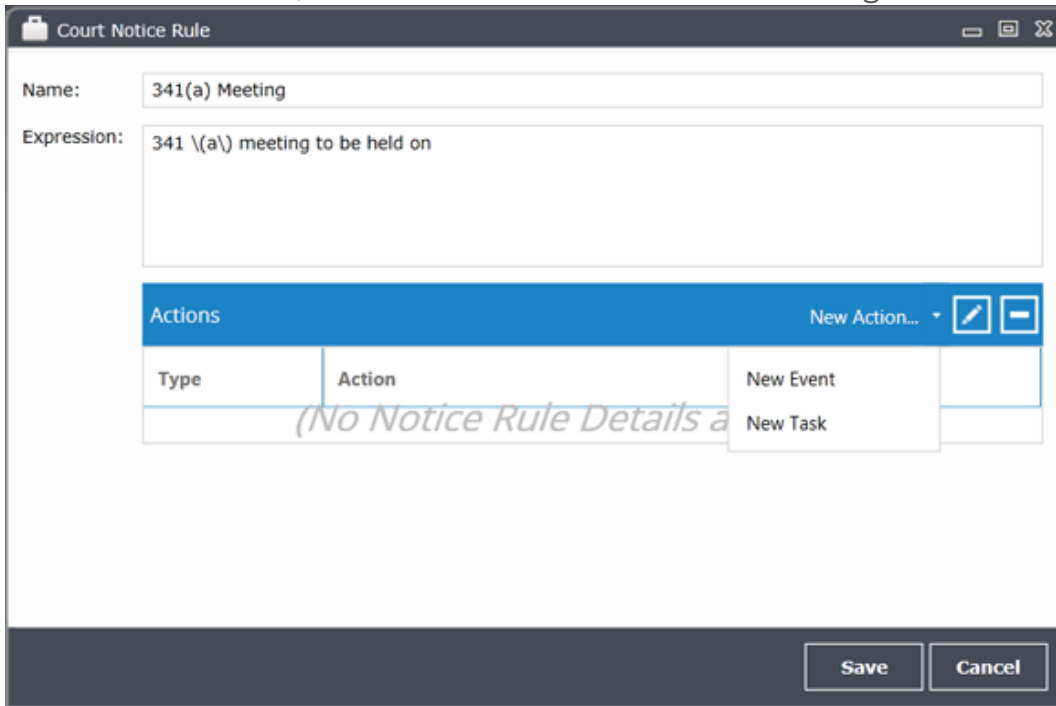
Date	Title
1/30/2013 2:03:23 PM	13-bk-450 -RLM-7 Exhibit D - Statement of Compliance
4/19/2012 2:07:15 PM	FW: Proof of ClaimCh-13 11-11809 Matthew Paul Smith
2/7/2012 12:48:45 PM	RE: Ch-13 11-11809 Notice of Mortgage Payment Chang
11/30/2011 12:29:38 PM	RE: Ch-7 11-11999 Voluntary Petition (Chapter 7) Bruce
11/30/2011 11:18:02 AM	RE: Ch-7 11-11960 Voluntary Petition (Chapter 7) Mary J

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



Court Notice Rule

Name: 341(a) Meeting

Expression: 341 \\\(a\\) meeting to be held on

Actions

Type	Action
	New Event
	New Task

(No Notice Rule Details a

Save Cancel

6. Enter the Task Details

Task - New

Action Name: Send Compliance

Title: Send Bk

Instructions: Send bankruptcy compliance to Trustee via email.

Reminder: 15 min

Add User: Paralegal Susie

Ok Cancel

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

Event - New

Action Name: 341

Event: On Location Calendar
 On User Calendar
 On Attorney on Matter Calendar

Event Template: 341 Meeting

Categories: ■ 341 Meeting
[Edit Categories](#)

Reminder: 15 min

Duration (mins): 60

Ok Cancel

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

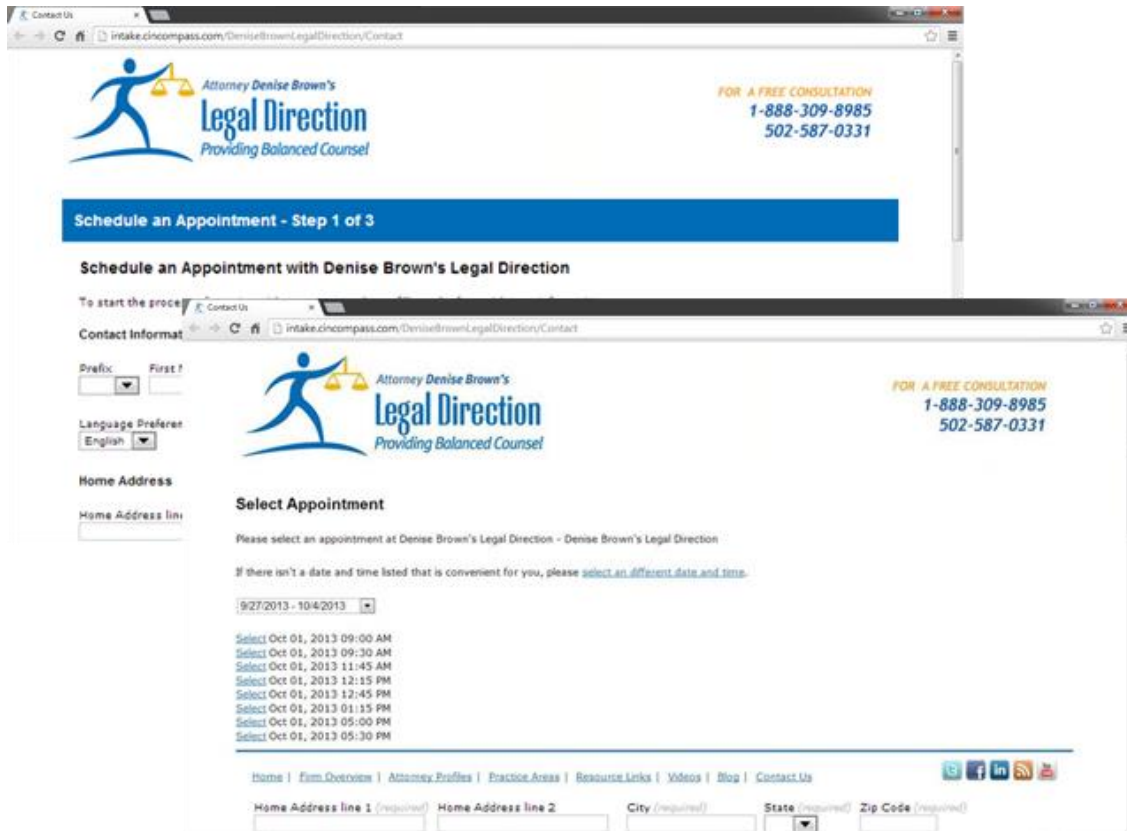
Imagine offering the ability for potential clients to schedule their own appointments with you via your website. With CINcompass you can integrate your website to your matters. Simply create an online intake form and configure auto-communications that will inform your potential clients about what to 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.”

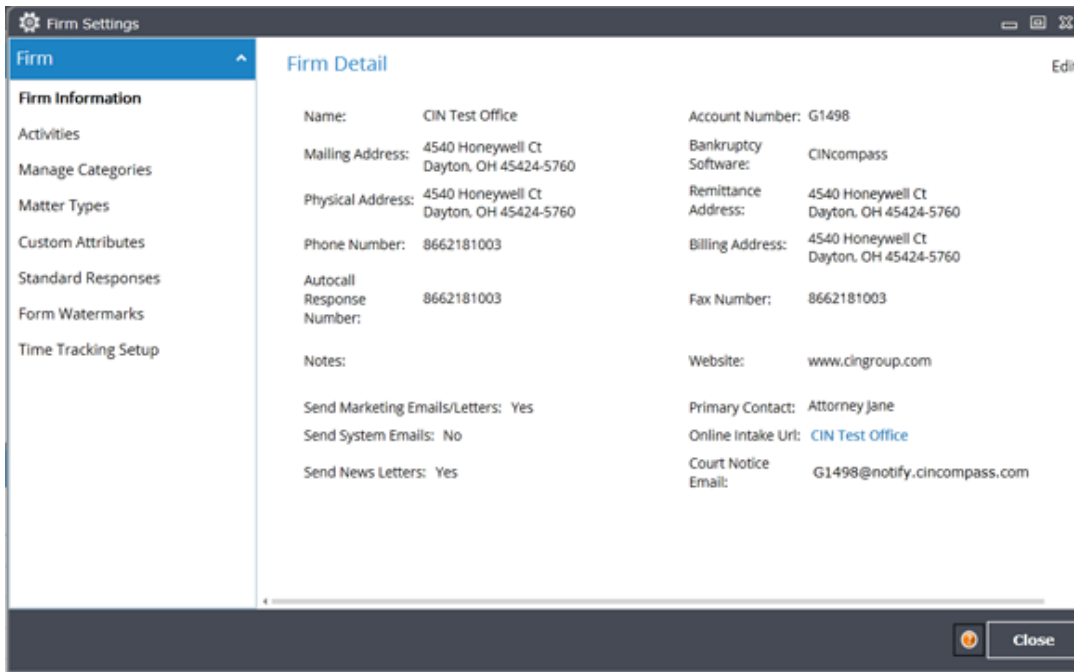
- Denise Brown, Attorney, Louisville, Kentucky




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](#) 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**

The screenshot shows a window titled "Intake Meeting" with a dark header bar containing a calendar icon and window control buttons. The main content area is titled "Enter Intake Block Details" in blue text. Below the title, there are three input fields: "Available Intake Processors" with a spinner box showing the number "2", "Start:" with a time selection box showing "7:30 AM", and "End:" with a time selection box showing "9:30 AM". Below these fields is a checkbox labeled "This event is recurring?". At the bottom right of the window, there are two buttons: "Save" and "Cancel".

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

Intake Meeting

Enter Intake Block Details

Available Intake Processors

This event is recurring?

Start Time: Start Date:

End Time: End Date:

Daily Weekly Monthly Yearly

Recur every Week(s)

Sunday Monday Tuesday Wednesday Thursday

Friday Saturday

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

Client Intake Queue

List of Requests in the Queue:

Date Submitted	Client Status	Source	Name	Requested Meeting	Requested Loc	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 Applesseed	02/09/2012 02:30:A	Downtown Location	BankruptcyMatter

Process Client Intake

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

Frank Rizzo

New Client

Contact Details

Primary Applicant Information

Joint Applicant Information

Dependents

Matter

Intake Meeting

Notes

Intake Details

Full Name...: Frank Rizzo

Company: [Empty]

Display As: Frank Rizzo

Marital Status: [Empty]

Gender: [Empty]

Belongs To: Dayton Location

Website: [Empty]

Home: 4540 Honeywell Ct
Dayton, OH 45424-5760

SSN: Social Security Number

Location: Dayton Location

Client Source: [Empty]

Preferred Contact Method: [Empty]

Home Phone: (866) 218-1003x____

Mobile Phone: (866) 218-1103x____

Business Phone: Phone

Fax Phone: Phone

Instant Messenger ID: [Empty]

Email1: frizzo@yahoo.com

Language Preference: English

DOB: Enter date

Status: Qualified

Communication Preferences

Primary Email: (Email1) frizzo@yahoo.com

SMS: (Mobile) (866) 218-1103 DO NOT SMS

Fax: None

Complete Return to Queue Cancel

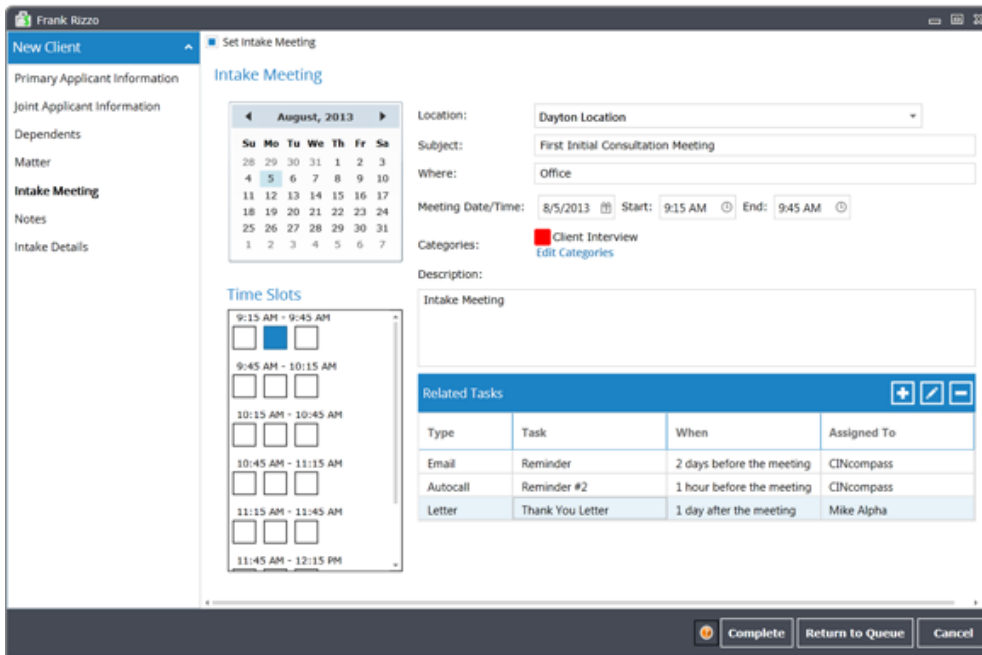
4. Go to the **Intake Meeting** tab

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

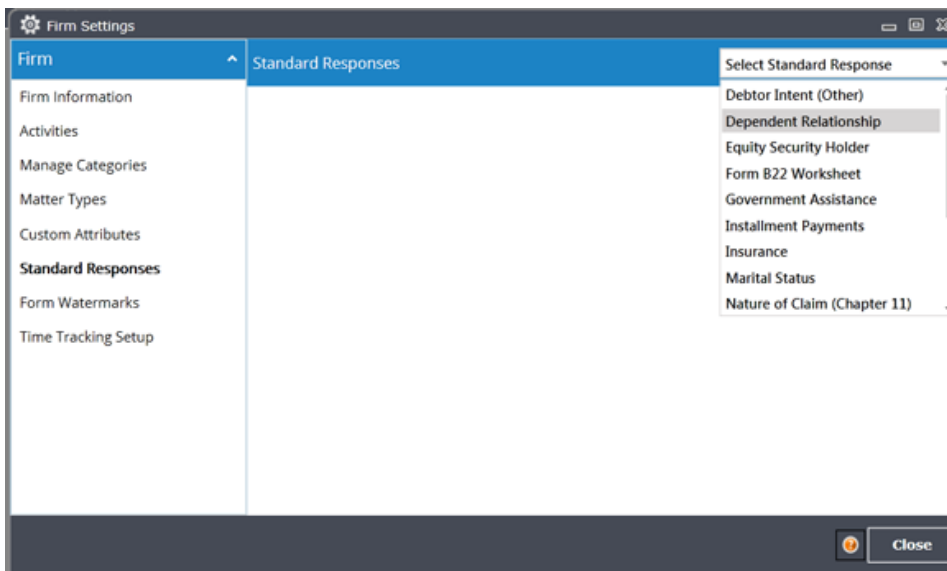


Did you know?

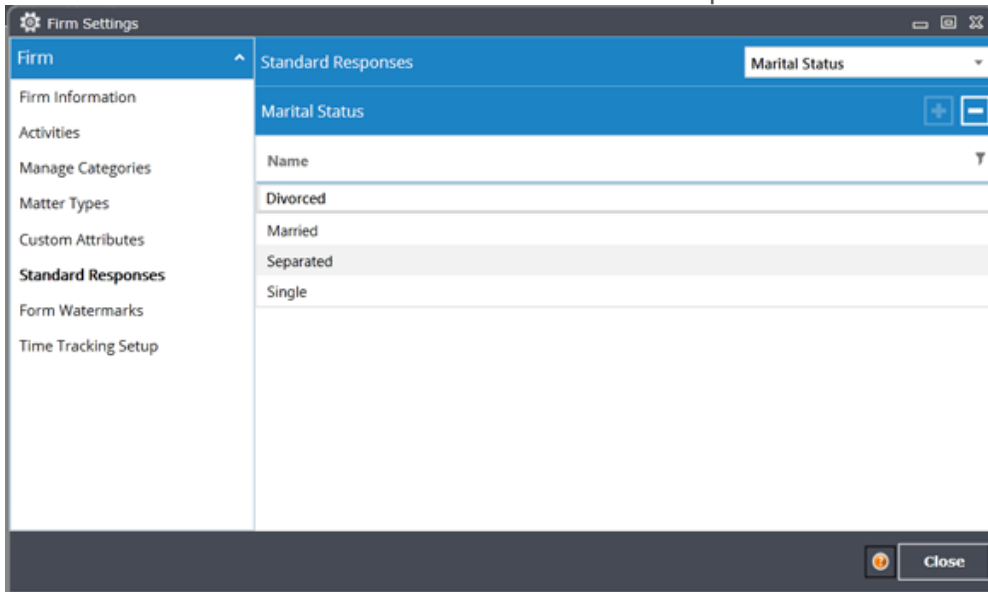
Save data entry time when preparing a petition by using CINcompass Standard Responses.

To add Standard Responses for your Firm:

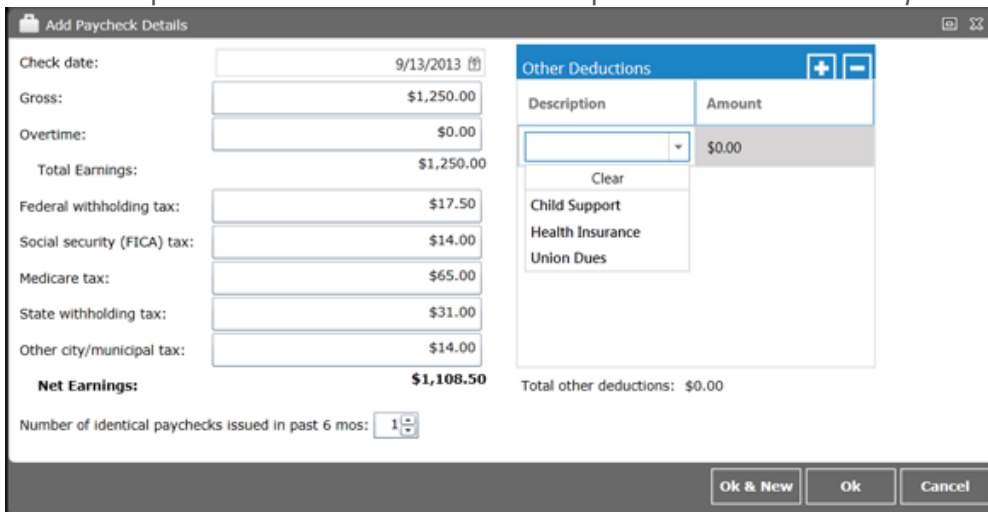
1. Under the Admin Tool, select **Firm Settings**
2. Click on the **Standard Responses** tab
3. Select the Standard Response category



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



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



We love & appreciate feedback. Email us at connection@cincompass.com to provide us with your comments, topic suggestions, and any other pointers to help make this e-newsletter even better. Please add connection@cincompass.com to your safe sender list or address book. The CINgroup provides innovative due diligence and workflow products for attorneys practicing bankruptcy. Serving customers nationwide, our software products include Best Case® Bankruptcy, CINcompass® and EZ-Filing® along with due diligence services under CIN Legal Data Services®, Suite Solutions™ and Quadrant Legal Solutions™ names.

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