

Addendum to the Case Management System Review 23 March 2021

Self-Assessment and inclusion of Consensus (Microsoft Power Platform)

4. Detailed assessment of case management systems

4.5 Consensus

4.5.1 Overview

Consensus is a matter management system built on the Microsoft Cloud. Launched in 2021, Consensus leverages underlying Microsoft technology in the Power Platform, resulting in a robust, secure and seamlessly integrated experience for its users. Critically, Consensus data is stored in the organisations existing Microsoft environment, for unrivalled standards in data security. Specifically relevant for Community Legal Centre's, this means that they own and control the data that is created.

Microsoft Power Platform is one of the leading Business Application Platforms. Consensus has leveraged the Microsoft Cloud Platform to enhance and extend the Power Platform core functionality to bring users innovation and investment in a scalable and repeatable way.

Microsoft and Barhead have a strong commitment to the NFP sector, reflected in the discounted pricing for NFP's available and Barhead being awarded Microsoft Partner of the Year for their work in the industry.

4.5.2 Centres using

Marrickville Legal Centre.

4.5.3 Costs

Type	Amount
Purchase Fee	Nil
Implementation	Varies, from \$10,000 AUD.
Licensing (per staff)	\$ 420 / user per annum*
Licensing (per volunteer)	\$0
Support	From \$15,000 / per year
*Additional costs	Microsoft Power Platform licence required from \$5 AUD / user / month.

4.5.4 Self- Assessment

Strengths	For improvement
<ul style="list-style-type: none">Data sovereignty and security – data is stored in CLC's Microsoft environment.	<ul style="list-style-type: none">Microsoft Power Apps skills are required to edit or amend data entry forms

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| <ul style="list-style-type: none"> • Integrated with Class Application Suite for National Data Repository • Native integration with SharePoint for Document Management • Native integration with Outlook and Calendar for email management and appointment management directly to Activities and Services (for tracking emails and appointments to a matter) • Automation of processes and forms eg automation of intake to enquiry data • Configurable settings allow users to create their own templates. • Manages critical dates and has customisable warnings and alerts with reminders and notification templates. • Powerful search across all data, documents and emails • Automated Conflict Checking capability • Supervision / approval of cases requiring review • Out of the box dashboards and reporting provide excellent reporting capability. • Admin portal for managing staff and volunteers, and setting user groups and permissions. • Familiar, intuitive interface for ease of training and onboarding. • In-app help and portal support available • Management, tracking and triage of enquiries • Cloud-based, mobile, secure, works offline • Central source of all information, data, emails and documents related to a Client, service or enquiry record • Supports easy integration with other services using Microsoft Power Automate • Users and centres can create and customise their own experience and workflow • Based on underlying Microsoft technology so flexible and scalable. Microsoft is well-established and well supported in the market. • Supports client and end-user surveys, matter opening and closing checklists and activity templates for pre-set tasks. | |
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<ul style="list-style-type: none"> • Tracks referrals • Product team is Australian based supported by team members in the Philippines 	
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4.5.5 User Feedback via survey

Positive	Negative
<p><i>In my work with women experiencing domestic violence, I have found consensus to be a very user-friendly system. It is exceptionally easy to do the filing of emails directly into the clients file in consensus. It is straightforward to add notes for phone calls and tasks. It is easy to file documents into consensus also and I believe that there will be more integration to look forward to, with templates being built in to the system. I find I am able to do more administration with consensus with less time, this translates into more service provision for my client group which is the ultimate goal for any DV service.</i></p> <p><i>Angela Boyland MLC Domestic Violence Support Worker</i></p>	<ul style="list-style-type: none"> •

Appendix 1: Case Management System Checklist

This checklist outlines key considerations for a Community Legal Centre when selecting a case management system, including:

- Problem definition
- Functionality
- Integration
- Costs
- Vendor capacity

Problem definition

Different Centres will have different priorities and requirements for what they need a case management system to do. What is your overall vision for the CMS, business objectives, and key outcomes for a CMS? This will inform what functionality is required.

Functionality

The table below provides a sample of the functionality a CLC may require. It is not comprehensive. It is important that each CLC scope out the functionality that they require.

Activity	Description	Consensus Response
Client management	<i>Client details at a glance, Alerts for high risk clients, Other parties, Conflict checking, Search, Handle ambiguous client data, Handle duplicates, See all matters and services for a client, Client portal</i>	<i>Fully complies. Client portal requires custom configuration</i>
Matter and Service management	<i>Matter at a glance – see all services provided as part of a matter, Reminders and alerts, File notes and tasks, Limitation dates, Time tracking, Assign a matter, Search for a service or matter; Review matters for risk management; Archive a matter, Capture outcomes</i>	<i>Fully complies</i>
Referral management	<i>Referral to, Referral from, Track referrals, Internal referrals</i>	<i>Fully complies</i>
Making appointments	<i>Create and view appointments, View calendar, Send reminders and followups, Link to Outlook</i>	<i>Fully complies</i>
Document management	<i>Where documents can be uploaded or linked to, Ease of managing documents across a remote workforce, Drag and drop, Create subfolders, Tag documents, Preview documents within system, Email chain kept with the</i>	<i>Fully complies, relies on Microsoft 365 Applications such as SharePoint and Outlook</i>

	<i>matter, Limit access to documents, Version control</i>	
Template management	<i>Create own templates or bring templates in from another source, Field pre-population for defined fields</i>	<i>Fully complies</i>
Staff management	<i>Review staff assigned cases, Workload management, Staff rostering</i>	<i>Fully complies</i>
User management	<i>Creating and modifying users, Password management; User permissions</i>	<i>Fully complies</i>
User experience	<i>How easy is it to use the system? To enter clients, matters and services?</i>	<i>Fully complies & easy to use</i>
Reporting	<i>Dashboards, Create reports, Export data to csv, XML and Excel; Graphs and charts in reports; Limit access to a report, Publish a report in Word or PDF</i>	<i>Fully complies</i>
Appointment management	<i>SMS reminders, Calendar, Synchronised with 365, shows up in matter if linked, list views of appointments</i>	<i>Fully complies. SMS delivery requires configuration.</i>
Messaging	<i>Send emails and SMS from CMS, Make phone calls, Track messaging</i>	<i>Fully complies. SMS delivery requires configuration.</i>
Security	<i>Where is the system hosted? Internal firewalls?</i>	<i>In the organisation's Microsoft 365 cloud environment i.e. no internal firewalls are required.</i>
Offline/Mobile phone version	<i>Is it possible to enter data offline? Is a mobile phone/tablet version available?</i>	<i>Fully mobile and cloud based via Microsoft Apps, offline access can be enabled</i>
CLE, Stakeholder engagement and Law reform	<i>Does it support recording data about CLE sessions, stakeholder engagement and law reform activity?</i>	<i>Fully complies. Requires custom configuration</i>

Integration

Activity	Description	Consensus Response
Integration with Office 365	<i>ie email appointments, reminders, and emails</i>	<i>Fully complies</i>
Integration to CLASS	<i>Can reporting data be automatically and securely transferred to CLASS?</i>	<i>Proposed future development</i>
Integration to DEX	<i>Can data be automatically and securely transferred from the CMS to DEX</i>	<i>Proposed future development, either manual upload to DEX or automatic sync to DEX</i>

Compatibility with National Legal Assistance Data Standards	<i>How easy is it to collect data in the form required by the National Legal Assistance Data Standards?</i>	<i>Fully complies</i>
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Costs

Items	Description	Consensus Response
Purchase Price:	<i>What is the purchase price of the product</i>	<i>Nil</i>
3 rd Party Plugin Costs:	<i>What other software do you need to run it e.g. document management software</i>	<i>Core users require Microsoft 365 Business Essentials or Microsoft 365 E1 at a minimum. Premium Microsoft Power Apps licences such as Power Apps Per User or Per App Plan also required.</i>
Licence Costs:	<i>What does it cost per user</i>	<i>\$420 per annum / staff \$210 per annum / volunteer \$420 per annum / admin</i>
Training Costs:	<i>What does training cost per user</i>	<i>Train the trainer training included in implementation services and additional training can be facilitated at Daily Rates.</i>
Support Costs:	<i>How much does support cost for a year</i>	<i>From \$500 / month</i>
Hosting Costs:	<i>Are there additional hosting costs</i>	<i>No</i>
Backup and Storage Costs:	<i>What are the costs of backups and data storage</i>	<i>We do not anticipate that there would be any additional storage costs, above what is included in Microsoft Licensing.</i>
Data Migration Costs:	<i>How much data needs to be migrated from old to new platform. Is the vendor responsible for data migration? What does your Centre need to do to support data migration?</i>	<i>Would need to be separately scoped. Barhead can support data migration however DIY migration is supported via CSV/Excel files.</i>
Customisation Costs:	<i>How much customisation is required?</i>	<i>Solution can be installed out of the box for \$10,000 AUD. Centres wishing to customise the solution can opt to include implementation services for up to \$50,000 AUD.</i>
Helpdesk support costs	<i>Are there additional costs for support?</i>	<i>See Support Costs above</i>

Vendor Capacity

It is important to understand the capacity of the CMS vendor. Do they have the ability to support your Centre, to keep the system updated, and do they have adequate local support. What is their long-term viability? –

<i>Description</i>	<i>Comment</i>	<i>Consensus Response</i>
Vendor presence in Australia	<i>Including local support team</i>	<i>Supported across all AU time zones</i>
How large is the vendor team?		<i>Barhead is 80 in Australia and approximately 200 in Philippines</i>
How long has the vendor been operating for?		<i>6 years</i>
Vendor involvement with Community Legal Sector		<i>Barhead have a long history with the NFP sector, having been awarded Microsoft Global Partner of the Year for NFP for 2 years running in 2021 and 2022. In addition, Barhead have had a long history working with Marrickville Legal Centre.</i>
Hosting	<i>Hosted in Australia?</i>	<i>Hosted in the organisation's Microsoft environment, in Australia</i>
Deployment support		<i>Included in the installation costs</i>
Ongoing maintenance		<i>Product updates and maintenance are included in the licence fees.</i>
Training	<i>How much training is offered?</i>	<i>1 Day Train-the-trainer included in implementation. Additional training available on request.</i>
Support	<i>What helpdesk support is provided? Who is your first point of call in a failure? Are they local?</i>	<i>Support is provided through in-app help and online support portal. SLAs for escalating issues. Additional support including phone support available at additional cost.</i>
Contract considerations	<i>Limits of liability, Insurance, Standards of service</i>	<i>Barhead is covered by its standard insurance policies.</i>

Other Considerations

Activity	Description	Consensus Response
Customisation	<i>How much customisation to the product is required? How easy is the product to customise?</i>	<i>The app can be used as-is once installed. Users/organisations can configure the app, and customisations are explored as part of implementation.</i>

Regional and Remote (offline operation)	<i>Is there a need to use the solution offline? Eg at courts</i>	<i>Solution is fully mobile and cloud based, with offline access supported.</i>
Software requirements	<i>What software does your Centre need to run the system eg what version of Windows is required? Does it run on a Mac?</i>	<i>Compatible with all PC's and Macs running a standard browser. Runs as a web-based application or mobile App, supported by iOS & Android.</i>
Community legal education and law reform	<i>Does the system allow for collection of data on CLE and law reform</i>	Yes