

Ceartas user guide

Ceartas is a user friendly file and case management application. This is a quick guide showing you how to get started.

Getting started

If you have a brand new installation of Ceartas then you'll want to begin by adding new clients to the system. If you are a new user to an existing Ceartas system then you'll either want to add new clients or amend existing clients information.



Adding new clients

- Press the 'New client' button on the top bar. Just fill in the fields, paying particular attention to the required fields, and press the 'open client folder' button.
- Alternatively, if you want to quickly set up an appointment for a *potential* new client and you only know the person's name then you should press the 'Diary' button, click on one of the appointment times listed on the left of the window and fill in the details. Should the person later go on to become a client then clicking on the appointment will allow you to create that new client.

Finding clients and cases

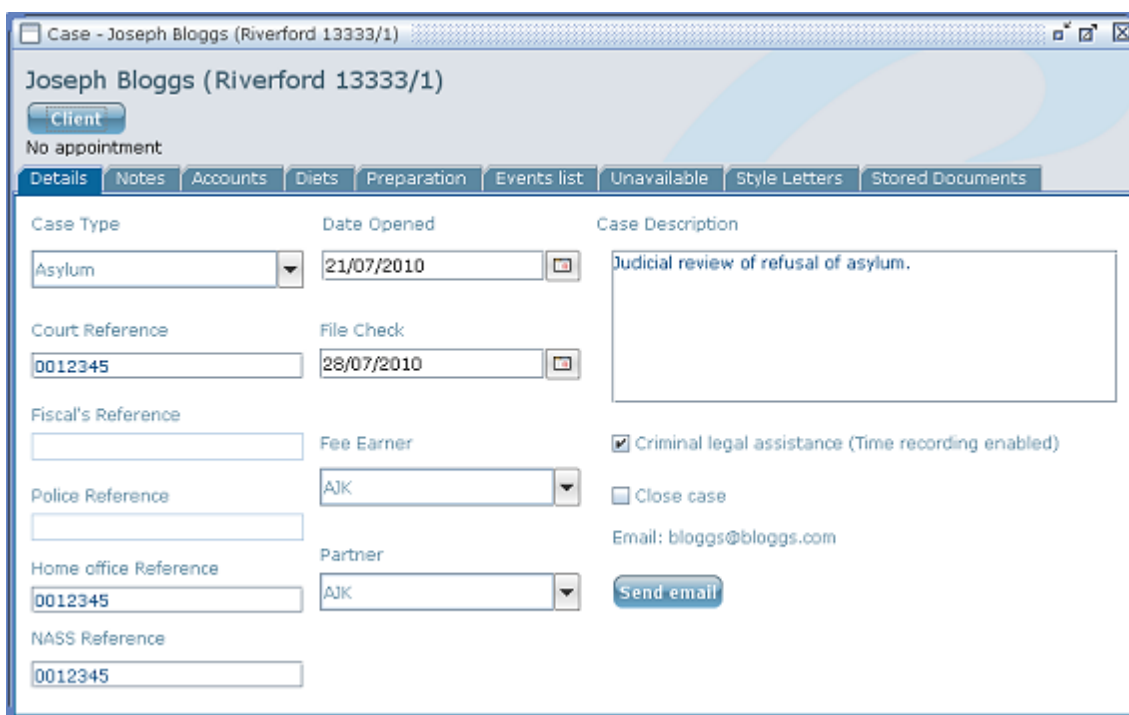
Use the search or advanced search to find clients, or press the 'Go to case' button to go straight to a case where you know the client and case reference.

Adding new cases

Once you have opened a client, select the 'List of cases' tab and then press the 'Open a new case' button. You will be asked if the case is to be feed as Criminal Legal Assistance. The case will be opened. You should fill in as many of the known case details as possible including the **case type**. However, the most important thing to do is select the accounts tab and set the correct **Feeing basis** and **Action type** which are crucial for the correct feeing.

Managing cases

This is a screenshot of a case window.



Case - Joseph Bloggs (Riverford 13333/1)

Joseph Bloggs (Riverford 13333/1)

Client

No appointment

Details | Notes | Accounts | Diets | Preparation | Events list | Unavailable | Style Letters | Stored Documents

Case Type	Date Opened	Case Description
Asylum	21/07/2010	Judicial review of refusal of asylum.
Court Reference	File Check	
0012345	28/07/2010	
Fiscal's Reference	Fee Earning	<input checked="" type="checkbox"/> Criminal legal assistance (Time recording enabled)
	AJK	<input type="checkbox"/> Close case
Police Reference	Partner	Email: bloggs@bloggs.com
	AJK	<input type="button" value="Send email"/>
Home office Reference		
0012345		
NASS Reference		
0012345		

Events

Events for a case are listed in the 'Events list' tab of the case. Events can be created in four ways.

- Event builder creates *single* events.
- Precognition builder creates *multiple* events associated with a precognition.
- Advocacy and *multiple* related events are created via diets in the Court Diary.
- Creating a style letter automatically creates an associated event in the event list.

Case accounts

Select the Accounts tab. Here you can set the case feeing basis (Private, Legal Advice & Assistance, Criminal or Civil Legal Aid) and the action type. From this window you can also update the account details by clicking on the 'Account tracking' button, and render and print the account.

Fixed and block fees

By default no gauge appears and a tab called 'Unavailable' appears in the case window. The tab's status will update for the following:

- Fixed fees. If the case type is set to 'Summary criminal' then the 'Fixed Fees' tab will become visible.
- LAA fuel gauge. If the feeing basis is set to 'Legal Advice & Assistance' then the 'LAA fuel gauge' will appear.
- Block fees. Feeing basis is 'Criminal Legal Aid' and Action Type is set to 'Block Fees – Solemn', OR, feeing basis is 'Civil Legal Aid' and Action Type is an 'Ordinary Cause' option.

Style letters

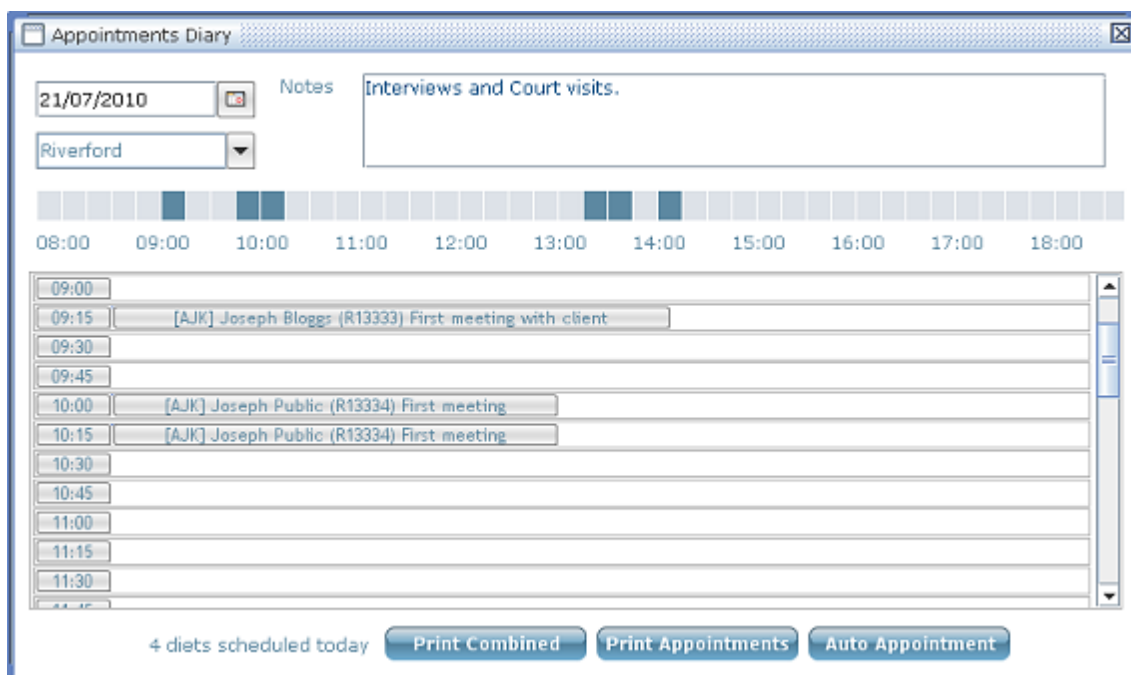
The style letters are a set of standard letter templates. Navigate through the folder structure to find the desired letter – pressing open will automatically create an associated event with the appropriate fee.

Stored documents

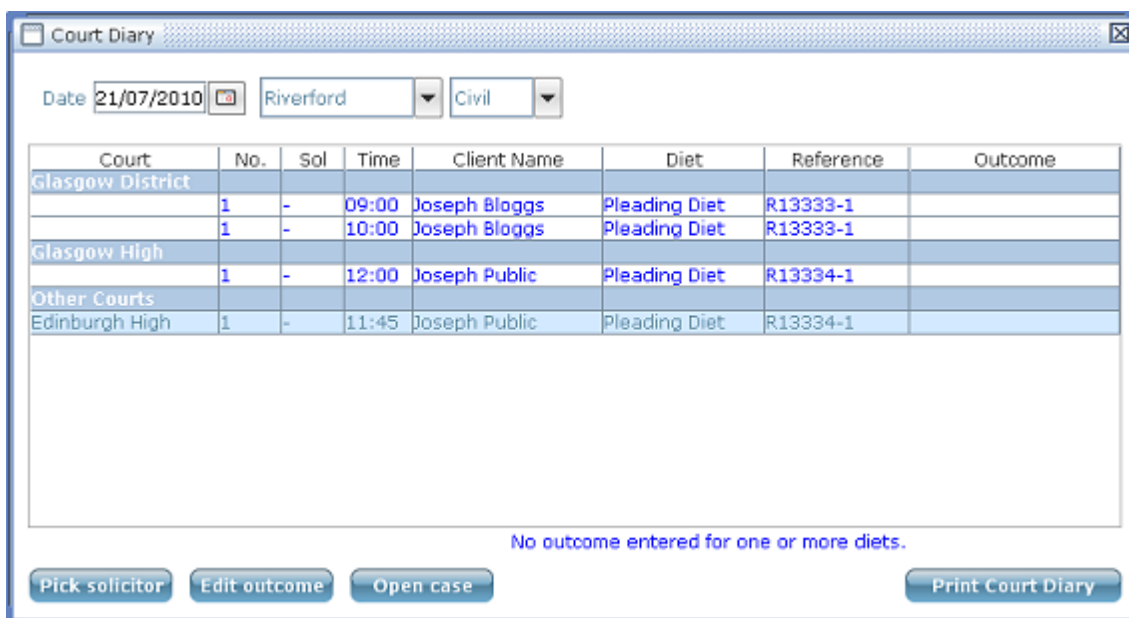
You can either create a brand new word document or import a document, which can be *any* document, e.g. Adobe pdf, excel spreadsheet etc.

Diaries

Press the ‘Diary’ button to open the client appointment diary. Clicking on a particular time slot button will allow you to enter the appointment details. Clicking on the appointment allows you to either add the appointee as a new client or view the existing client's details.



The court diary lists all diets for a particular day. Double-clicking on a particular diet will open up the 'Add Outcome' window where advocacy and non-advocacy (attending client, waiting, etc), travel and outlays can be inserted.



Accounts

Press the accounts button to access *all* accounts for your practice. Here you can enter the account rendered and paid dates.

The tools menu

File check - Lists all cases for a particular solicitor.

Work sheets - Allows you to calculate the total fees and list the work done (events) for a particular solicitor over a selected date period.

Time sheets - Allows you to view all the work done (events) by a particular solicitor on a particular day.

Custody visits - To arrange and log visits to clients in custody including associated waiting and travelling times.

Custody list - Lists all clients in custody and the associated custody

details.

Reports - Give a *general overview* of the amounts rendered, paid and outstanding for each office over a selected date period.

Analysis reports - Give a *detailed* breakdown of the case types and work, appointments, etc by staff member.

Warnings - Gives an overview of accounts which are over extension, accounts which haven't been rendered and cases for which outcomes have not been entered.

Setup - Those Ceartas users who have *admin status* have the privilege of being able to make changes to the Ceartas setup, e.g., updating practice and office details, adding court names, making updates to rates, etc.