



CaseLink²

New York Trustee Assistant Finds Renewed Love for Web-based Case Administration and Greater Productivity with *CaseLink²*

Trustee William Leberman and his assistant, Karen Barber, were curious to try web-based software. With improved accessibility and workflows, they have since found their most productive practice using *CaseLink²*.

Comfort with Office, Curiosity for the Web

Mr. Leberman and Ms. Barber were longtime users of *CaseLink Office*, having used the software in their New York-based Chapter 7 practice since Mr. Leberman had gone on panel in 2003. However, they were curious to try something new that might enhance their efficiency. So, in September 2015, they moved over to BMS' web-based software platform, *CaseLink Web*.

The software was different, but Ms. Barber quickly got into her stride. However, there were still certain case scenarios she struggled with in the software. "I preferred the setup of *CaseLink Office*, so it was initially challenging to get used to the differences in *CaseLink Web*," Ms. Barber said.

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When Mr. Leberman and Ms. Barber saw a demo of *CaseLink²* in September 2016, they were elated to see the new web-based platform's similarity to *CaseLink Office*, as well as its streamlined workflows and improved speed. With that insatiable urge to constantly refine their processes and productivity, Mr. Leberman and Ms. Barber decided to upgrade to *CaseLink²*.

Functionality of Office Meets Flexibility of the Web

"All of the information I need is at my fingertips, and I can see at-a-glance everything I need to know when I sign in. Also, the improved speed is great!"

Since switching to *CaseLink²*, Ms. Barber has noted profound improvements to her and Mr. Leberman's daily workflows and overall efficiency – particularly in her 341(a) management and distributions.

"Our 341(a) meeting workflow is much better," Ms. Barber said. "When I'm prepping for 341(a) meetings, it's very easy to maneuver in and out of the cases to get the calendar ready. It's much more efficient. Also, in those complex cases that we have, the Distribution Scenarios feature is very handy when we want

to figure out, "If this claim is reduced to X, the distribution would be Y," she added.

With the similarities of *CaseLink²* to *CaseLink Office*, Ms. Barber has found her peak productivity, and is loving it. "I am very happy with *CaseLink²*. The functionality is much more like *CaseLink Office*, which I love, and everything just makes sense in this format," Ms. Barber said. "All of the information I need is at

my fingertips, and I can see at-a-glance everything I need to know when I first sign in each morning. Also, the improved speed is great!"

In her day-to-day workflows, Ms. Barber adores the system's features that keep her on top of the most important aspects of her cases at all times, such as the Alerts Panel and the Sidekick. "I love the Alerts panel," Ms. Barber said. "When I first sign in and start my day, I can see all of the most important information I need at a glance. Also, the Favorite cases feature on the Sidekick is wonderful. We have a handful of larger cases that I find myself working in more often, so I can pull those up very quickly using that feature."

As for updates and improvements to the platform, Mr. Leberman and Ms. Barber are thrilled that the web-based software is always up-to-date with the latest enhancements.

"Because it's on the web, the software is updated regularly by BMS, which is great. I receive all the latest features and improvements without having to do anything," Ms. Barber said.

Well Beyond Just Tech Support... Bankruptcy Expertise

While reveling in her streamlined software, Ms. Barber is over-the-moon about the support she and Mr. Leberman have received as BMS clients.

"The BMS Support system is great – anytime I run into a complex situation in a case that I'm not sure how to figure out in the software, I have been able to contact the Support Center or my Account Manager, Angela Vitale, and receive immediate assistance. They are so good at helping me with my complicated case stuff – well beyond just tech support, they provide bankruptcy expertise," Ms. Barber said.

"The BMS Support system is great... It is really one of the best things about being with BMS."

"The support is really one of the best things about being with BMS," she added.

Alerts Panel

- Cases**
 - 35 New emails have been received
 - 52 Cases under bonded (Balance > Bond Amt)
 - 15 Cases closed with issues
 - 50 Cases claims not marked as reviewed
 - 44 Cases ready for TFR
 - 136 Cases will be Reportable Tardy in 10 day(s)
 - Last offloaded cases for review on 06/14/16. They were imported on 06/14/16
 - 41 DSO Initial letters to be sent
 - 36 DSO Discharge letters to be sent
 - 139 Cases will be Tardy in the next 10 day(s)
- Banking**
 - 2 Stale checks in 2 case
- Court**
- Tasks**
 - 47 Tasks are past due
 - 114 Closed tasks
- BMS Training**
 - Online Training Library



5 Peters Canyon Rd, Ste 200
Irvine, CA 92606

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