



CaseLink<sup>2</sup>

## CaseLink Power User Breezes through Audit, Discovers Improved Productivity and Organization with CaseLink<sup>2</sup>

Trustee Ed Mazel and Trustee Assistant Phyllis Stice were early adopters of the web-based software platform from BMS, and after years of excellent responsiveness to their requests, they could not be happier with the continual delivery of better processes and solutions – including *CaseLink<sup>2</sup>*.

### Initial Concerns Heard and Addressed

When New Mexico Trustee Ed Mazel was appointed to the panel as a Chapter 7 Trustee in late 2012, he was adamant about wanting to use a web-based software because he saw that as the future. Thus, he chose *CaseLink Web* by BMS.

Being a new panel trustee, Mr. Mazel wanted to balance out his Chapter 7 practice with someone who knew the ropes. Trustee Assistant Phyllis Stice was a power user of *CaseLink Office*, and was well-established with her workflow within the software. She had used the desktop-based software from BMS since 2000, when she had assisted another Chapter 7 Trustee.

When Ms. Stice joined Mr. Mazel's practice, she found that differences in the *CaseLink Web* software were challenging at first, since she had become so comfortable with the *CaseLink Office* software previously. Additionally, while she liked many aspects about *CaseLink Web*, she had some concerns about functionality missing from the software that she had enjoyed in *CaseLink Office*, even though she appreciated working on the web.

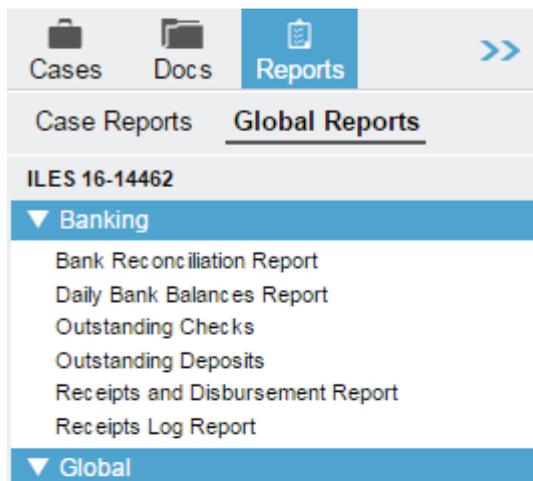
Thus, with great reluctance, Mr. Mazel and Ms. Stice began to look at another vendor's web-based software platform and began the process of separating from BMS. Soon, however, they found that the other vendor could not deliver near the level of service they had become accustomed to with BMS. "We ended up staying with BMS because they listened to what we wanted and implemented it in the software," Ms. Stice said. "I was so relieved because I had worked with these people for so long and hated the thought of leaving. One of the best things about *CaseLink* is the people that are building it, and their understanding of the software as well as the processes that are involved."

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With that trust and experience, when Ms. Stice reviewed a demo of BMS' new platform – *CaseLink<sup>2</sup>* – she was delighted and gratified, and had no reservations about making the simple upgrade.

### Breezed through an Audit Soon After Switching

Shortly after switching to *CaseLink<sup>2</sup>*, Mr. Mazel and Ms. Stice had to undergo an audit. They were thankful



to find that the latest version of BMS' web-based software made things so much easier in that process.

"We had just switched to *CaseLink*<sup>2</sup> in September and a couple of weeks later we had to go through an audit," Ms. Stice said. "As part of last minute preparations for the audit, I recalled that I had regularly generated and saved a particular report over the years, and I needed to know that I could find those in order to show that we were in compliance. Using *CaseLink*<sup>2</sup>'s new Sidekick feature, I was able to quickly find those reports and ensure they were available for review by the auditor."

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auditor asked if we had this and this, and we could say, 'Oh we do! And we can find it for you right now!' That was so helpful," Ms. Stice added.

The Trustee's case load has increased in the past few months, and Ms. Stice very much appreciates that the software helps her to stay on top of her tasks. "It helps me to keep up with almost everything," Ms. Stice said. "With the updated Alerts panel, which is the first thing I see when I log in, I can quickly see what needs to be done and add tasks and tags to keep me on track."

The customizability of the software also fits Ms. Stice's particular preferences to a tee with the ability to add, remove and move around modules. "I think the customizability is actually one of the better things about *CaseLink*<sup>2</sup>," Ms. Stice said. "Because each district has its own rules and methods, we all require different things to stay compliant. Options are what we need and that's what BMS gives us."

In addition to all of those benefits, Ms. Stice loves the software's overall organization, particularly for documents.

"I love being able to look at every document I could possibly want in the whole world if I want to find it," Ms. Stice said. "It's more similar to *Office* which I had used for so long, so I like that. The total organization is much better and visually more streamlined."

## Support that Listens and Implements Feedback a True Value

As a power-user of the *CaseLink* platform, Ms. Stice has always been vocal about what she'd like improved in the software, and she says she knows she is being listened to by her Account Manager Tanya Olson as well as the BMS Support Center. "I know that when I ask for something, it's evaluated and gets implemented in the software," Ms. Stice said. "I know that I'm being listened to, and that's the reason I ultimately stayed with BMS. I knew that the people working on the software were capable of giving users the very best, and they always have been."

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