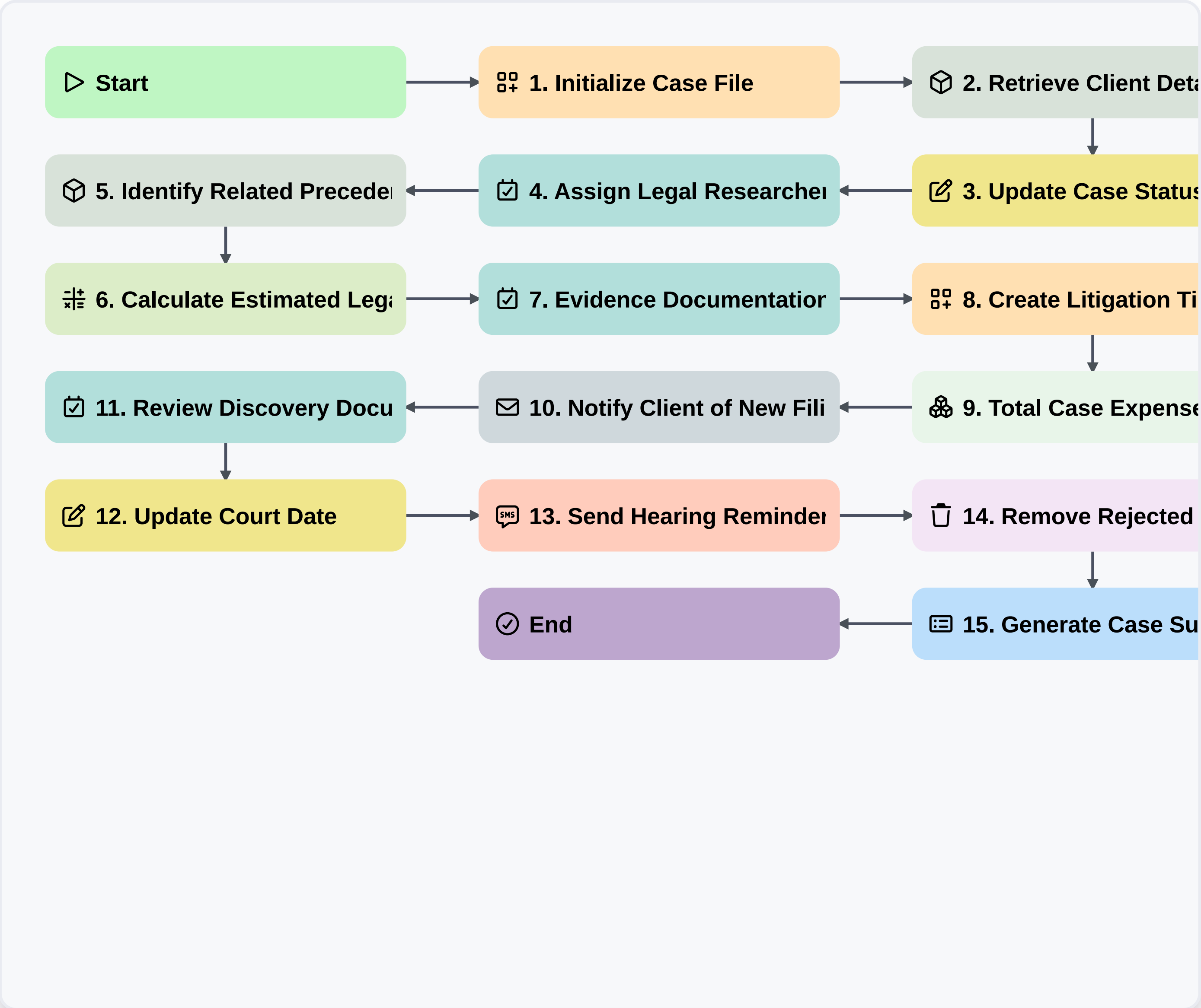
ChecklistGuro

Legal Case Management Workflow



Start

Start of the Workflow/Process.

1. Initialize Case File

Create a new entry in the 'Legal Cases' data model to initiate the workflow.

2. Retrieve Client Details

Fetch all existing data entries from the 'Clients' data model associated with the current case.

3. Update Case Status to 'Active'

Update the status field of the current Case entry to 'Active' once the intake is complete.

4. Assign Legal Researcher

Create a task for the Legal Research team to begin reviewing case evidence.

5. Identify Related Precedents

Search the 'Legal Precedents' data model for entries matching the case category.

6. Calculate Estimated Legal Fees

Execute a formula based on hourly rates and estimated hours to provide a cost projection.

7. Evidence Documentation
Create a task for the Paralegal to upload all necessary documents to the case entry.

8. Create Litigation Timeline
Create a new entry in the 'Timeline' data model to track important court dates.

9. Total Case Expenses
Aggregate all 'Cost' properties from 'Expense' entries related to this case to find the total spend.

10. Notify Client of New Filing
Send an automated email to the client's email address found in the Client data model.

11. Review Discovery Documents
Create a task for the Lead Attorney to review all incoming discovery entries.

12. Update Court Date
Update the 'Next Hearing Date' field in the Case entry based on new court summons.

13. Send Hearing Reminder
Send an SMS to the client's phone number 24 hours before the scheduled court date.

14. Remove Rejected Evidence
Delete entries from the 'Evidence' data model that have been flagged as 'Inadmissible'.

15. Generate Case Summary Report
Create a comprehensive PDF report summarizing all case details, tasks, and expenses for the client.

End
End of the Workflow/Process.