





The WIDE WORLD of AI Tools

Artificial intelligence is shaking up nearly all industries, and the legal community is no exception. This technology is impacting the practice of law by streamlining processes, increasing efficiency, and improving client representation. But trial lawyers must also exercise caution, perform due diligence, and be aware of the technology's limitations.



Leveraging AI With CASE MANAGEMENT SYSTEMS

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Here's how your CMS
can incorporate AI
for more efficiency.

Artificial intelligence is not here to replace the people who make your firm unique. It's been described as a backup camera that makes things a little easier. Backup camera technology beeps when you are too close and shows you spots you cannot see—but ultimately it is sending those messages to you, the driver, to process and decide what to do with the data. Artificial intelligence can be used the same way to make your case processes easier while giving you and your team the information you need. In particular, I've found that AI built

into a case management system (CMS) can maximize efficiency and enhance a firm's level of service. Let's explore the different ways a CMS can use AI.

Activity Summaries

Suppose a client calls and wants to know what has happened in the last month on their case. You are thinking about a hundred other things and need to look at your system and figure out the answer to their question. You could tell them you will call back after you have time to assess everything, or tell them something

based off the best of your recollection, or send them to voicemail. Alternatively, at the push of a button, your CMS can generate a summary of everything that has happened in the client's case over the last month.

For example, the CMS summary might reveal the following:

- “Medical records were received via fax but still missing dates of service ([Link to details](#)).”
- “Demand was drafted ([Link to details](#)).”

From this brief summary, you know that a demand has been drafted but because a record was missing, the demand has not yet been sent. Conveniently, the summary will include a link directly to the source of its information if you need further verification.

There is no guessing, the case status information is at your fingertips, and updating your client can come off of your to-do list in less than a minute. You'll have to review the information provided in the summary and decide what to pass along to your client, but AI removes the risk of error about the details and allows you to stay on task.

Medical Summaries

We all know that medical records can be voluminous and time-consuming to review, but thorough review is necessary. AI can summarize, organize, and bookmark records for you quickly. It also can flag inconsistencies in the records that require your higher level of review. And AI can learn to look for certain things, such as whether a diagnosis was not billed, whether the client has reported inconsistent symptoms, and whether there were any preexisting injuries of concern.

As we know, every insurance company is looking at those billing codes. Artificial intelligence can list and flag every applicable billing code relevant to your client's treatment, allowing you to

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know what the defense is going to focus on before you even send your initial demand. Artificial intelligence will add CPT codes (uniform codes for medical services) that are clearly identified in the records but that were missed in billing—catching errors in medical billing and properly reflecting the treatment that your client received.

Most AI products are programmed to learn from changes made to medical record summaries once you have reviewed them. For example, if it's your practice to avoid using the word “complaint” or “complaining” in medical summaries, your AI can learn from you deleting those specific words and will

remove “complain” from its language going forward. Eventually, the AI program you choose to implement will learn exactly how you want your medical record summaries to be handled, eliminating the need for significant revisions.

Demands

A medical summary might get you halfway to a demand, however, there is AI that can take what it learned in the records and actually generate a demand. Your CMS can take the documents you provide (such as photographs, records, bills, and police reports) and generate a simple demand based on what AI has gathered over the life of the file. A draft can be ready for you to review and revise the same day you obtain that last record. It remains the attorney's duty to make any critical changes, strengthening the demand and, ultimately, the result for your client.

Alternatively, there are AI demand products integrated into some case management systems that review outside sources (such as verdict reporters, CPT codes, records, and bills) to create a comprehensive demand for all elements of your claim.

When initially using this type of AI product, your team will need to provide intentional corrections and feedback to the AI. Feedback should include language you do not want to include in demands, as well as the general format you prefer. This allows the AI to learn what you want and begin saving you hours of review and drafting time. Once your AI has learned your quirks, it's important to remember that there is not a one-size-fits-all approach to demands—good lawyering requires us to put our unique touch on each demand.

Document Generation

How many documents do we use every day that follow the same general

template? How much time do our legal assistants spend changing a highlighted name in a document and updating addresses to send out subpoenas, FOIA requests, or basic motions?

You can put AI to work by teaching it what CMS fields need to be incorporated over and over into documents. Then, have AI and your CMS create those documents for you. Using AI to generate documents will simultaneously reduce errors and increase your team's productivity; however, AI can only generate a document as perfect as the information put into your CMS.

Transcription Services

Artificial intelligence has taken transcription to the next level. I have not yet encountered a CMS that has developed transcription services, but there are many transcription services available that may be possible to integrate into your CMS. Working this feature into your CMS allows for your meetings and phone calls to be instantly transcribed, organized, and turned into action items and for key issues to be flagged.

There is no reason for your administrative assistant to spend valuable time transcribing your meetings. You can even use an AI transcription program while a deposition is in progress. This allows AI to flag any inconsistencies in the testimony before the deposition concludes.

Calendars

Case management systems and calendars are often quite convoluted. Too often, we mash multiple calendars together and have someone on the team keep track of all of them. But there are AI-powered solutions that review calendars from various sources—including your CMS calendar, Microsoft Outlook calendar, or Google calendar—and then logically arrange your day.

Artificial intelligence is built to learn how long you take to complete tasks, how you review your task list, and how to block off time for you to focus on your desired or priority tasks. It can also look at multiple calendars and find the most efficient time to schedule a meeting. Most AI calendar products also can integrate with your email and automatically block off time for meetings, hearings, and other tasks or time-off needs found in your email.

Task Automation

You can teach a CMS integrated with AI how you want your client's cases to move along and to automatically generate workflows for your team on a daily basis. Automating tasks will eliminate the time you spend dictating the same task over and over and maintaining checklists.

For example, a CMS with AI could instruct your team to order medical records as soon as your client's file is updated to show that treatment is complete. Artificial intelligence can even be programmed to take it one step further and generate the request for records via text or email as soon as treatment is completed. The ability to have AI keep a case moving without you having to micromanage tasks is extremely valuable.

Outcome Prediction

After doing all the tasks above, your CMS's AI should know as much as the insurance industry's AI when it comes to the value of your client's case. Allow AI to tell you what it thinks a case is worth, but do not let that number hold you back. It's merely a suggestion and probably what the defense is looking at for their analysis.


Selecting AI

The best starting point for incorporating any of the above AI features into your

CMS is to reach out to your current provider and see what products are offered that could be built into your existing system. At this time, if you have Clio, Filevine, MyCase, Neos, or PracticePanther, then you probably can already put AI to work.

If your provider does not offer any AI products, the next step would be to ask if your case management system allows for integration with individual AI products such as Zoom or Otter.ai for transcription, Clockwise or Motion for calendaring, EvenUp for demands, and Expert Institute for medical summaries.

When all else fails, an online search for the specific feature you'd like to incorporate into your CMS should reveal a plethora of new and constantly evolving AI products ready to work for you. When considering an AI product, it is critical to review it carefully—including the terms of service—and ensure your client data remains private and secure before moving forward.

Remember that AI can make errors or fail to recognize that something is important in your specific case. Undoubtedly as the driver of the case, it remains your duty to independently review all AI-produced materials. But AI can complete the bulk of certain work and significantly reduce your and your team's time spent on monotonous tasks. This can open up opportunities to spend more time thinking outside the box and lead to better results for your clients. 



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