



## ELM Solutions

# Passport® Collaboration Module

### Key Benefits

- Enhances communication between legal or claims professionals and their counsel
- Efficiently captures and standardizes data from legal service providers
- Maximizes control over data integrity and security
- Streamlines key collaborative business processes from end-to-end
- Enhances reporting and analysis with richer, more consistent data

*“...supports true collaboration between corporate legal or claims departments and their legal service providers...”*

ELM Solutions understands the business needs that underlie the exchange of timekeeper, accrual, budget, and matter status-related data with legal service providers. With these needs in mind, ELM Solutions has designed unique collaborative tools that not only streamline the capture of this data, but also provide clients with:

- End-to-end support for key collaborative business processes
- Maximum control over data integrity
- Richer data for analysis and reporting

The Passport Collaboration Module excels beyond basic delegation of data entry to law firms and supports true collaboration between corporate legal or claims departments and their legal service providers. ELM Solutions clients are able to leverage the module’s out-of-the-box, best practice-based support for common types of collaborative exchanges, such as budgets, matter status updates and narratives, timekeeper rates and information, and accruals. To support global business needs, Passport provides clients with the flexibility to manage financial-related collaborative exchanges with legal service providers using preferred local currencies.

The Collaboration Module leverages the patented Passport Collaboration Portal from ELM Solutions, which is a secure pipeline that uses advanced security technologies for the transmission of data and information between companies and their legal service providers. The portal makes collaboration with outside counsel easy and efficient, while also enabling companies to meet highly stringent data security standards that may be driven by regulatory or IT requirements. The Collaboration Module provides support for several vital collaborative processes, including:

**Timekeeper Collaboration** – Take control of cumbersome timekeeper rate reviews and more effectively evaluate legal service providers.

- Manage the exchange of timekeeper data from start to finish, including annual rate review processes, with tools that support the legal or claims department and its service providers each step of the way:

## Passport® Collaboration Module

- Legal or claims departments are able to efficiently initiate bulk rate requests, route submitted rates for review and approval, evaluate rates against historical data, and communicate rate decisions to legal service providers
- Legal service providers are able to quickly bulk upload timekeeper data in the client's specified format
- Enforce the consistent capture of desired timekeeper data (e.g., rate, classification, demographics, education, and expertise) for all timekeepers across all legal service providers with the use of standardized templates
- Support diversity initiatives and enable more effective timekeeper evaluation, peer group analysis, and rate negotiations through the capture and the use of enhanced timekeeper data

**Budget Collaboration** – Expedite budget creation and improve spend predictability.

- Streamline the request, receipt, and review of matter budgets from legal service providers
- Capture monthly, quarterly, yearly, fee/expense, phase, and life-of-matter budgets to enhance planning and spend management capabilities and support firm performance evaluations
- Request budget updates throughout the life of a matter to avoid surprise variances

**Accruals Collaboration** – Gain enhanced visibility into departmental cash flows, improve forecasting capabilities, and support corporate compliance with SOX and other financial reporting requirements.

- Easily request, receive, review, and report on work-in-progress estimates for fees/expenses from legal service providers
- Receive estimates for multiple matters – the bulk download/upload capabilities make the process simple for service providers
- Use the scheduling feature to automatically send routine monthly or quarterly accruals requests to designated legal service providers, which streamlines the gathering of accruals data

**Matter Narrative Collaboration** – Enjoy improved transparency into counsel's management of matters and progress towards resolution.

- Efficiently request and report on matter status updates and capture matter narratives from legal service providers
- Quickly access a consolidated view of a matter's progress throughout its lifecycle

With the Passport Collaboration Module, corporate legal and claims departments move beyond delegation and are empowered to streamline their collaborative business processes from end-to-end, maximize control over their data, and enhance their relationships with legal service providers.

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