

Client Processes Playbook



Legal Services - Malpractice (Vaccines) →


About Us:

Outsource Access is a comprehensive “business process outsourcing” and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their “Growth Partner” helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

Want to Take Next Steps? Scan the QR code and see a short video tour of our company and process with links to book a complimentary discovery call at:
OutsourceAccess.com/process





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OPERATIONS

Task | Calling for In-House Request and Recordtrak Requests

Description of the Task: This task involves making phone calls to initiate both in-house requests and requests through Recordtrak. The objective is to efficiently gather necessary information, facilitate document retrieval, and ensure smooth communication between parties for seamless case management.

1. Collect all necessary details about the in-house requests and Recordtrak requests that need to be made, including names, dates, and specific requirements.
2. Compile a list of the requests that need to be made, indicating whether they are in-house or Recordtrak requests.
3. Determine the priority of the requests based on deadlines, urgency, or specific instructions.
4. Block out a specific time in your schedule dedicated to making the calls.
5. Begin by making calls to the relevant in-house departments or colleagues to submit the requests and provide necessary details.
6. When making calls, introduce yourself as a Virtual Assistant and explain the purpose of the call.
7. Clearly communicate the details of the requests, including any specific instructions or requirements.
8. Request confirmation that the request has been received and will be processed.
9. Take notes of the responses received during the calls, including any reference numbers or follow-up actions.
10. Proceed to make calls to Recordtrak or other external service providers to submit relevant requests.
10. Ensure you have the correct contact information for Recordtrak and verify any unique procedures they may have.
11. Clearly communicate the details of the requests to the Recordtrak representative, including case numbers and specific documents needed.
12. Ask for confirmation of the process and the expected timeline for fulfilling the requests.
13. Document the outcomes of each call, including any promises of follow-up actions, deadlines, or reference numbers.
15. As you complete each call, mark it off on your call list to track progress.
16. If necessary, inform colleagues or stakeholders about the status of the requests and any relevant updates.
17. If any requests require follow-up calls due to outstanding issues, schedule these follow-ups and repeat the steps as necessary.
18. After all calls are completed, review your notes, update the request statuses, and ensure proper documentation for future reference.
19. Maintain open communication with in-house teams and Recordtrak to ensure timely and accurate fulfillment of requests.

Task | Recording Client Data on Clio

Description of the Task: This task entails accurately entering client data and information into the Clio platform, a comprehensive legal practice management software. It aims to maintain an organized and up-to-date record of client details for effective case management and streamlined communication.

1. Open your web browser and log in to the Clio platform using your credentials.
2. Depending on the type of data you need to record, navigate to the relevant module within Clio. This could be Contacts, Matters, Calendar, Tasks, etc.
3. Find the existing record related to the data you want to record. This could be a client, matter, appointment, or task.
4. Click on the record to open its details and information.
5. Update the necessary fields with the new data. This might include adding notes, uploading documents, updating contact information, or changing matter details.
6. Once you've made the required updates, click the "Save" or "Update" button to save the changes you've made.
7. If you're recording billable time, navigate to the "Time Entries" section within the matter and input the details, including date, description, time spent, and any applicable rates.
8. If you need to attach documents related to the matter, navigate to the "Documents" section and upload the files.
9. Double-check all entered data for accuracy, ensuring that you haven't missed any important details.
10. Close the record once you're satisfied with the updates you've made.
11. If the task was part of a to-do list, mark it as completed or update its status accordingly.
12. If your workflow requires it, document the action you've taken in your virtual assistant workflow or tracking system.
13. If relevant, communicate the updates you've made to the appropriate parties, such as attorneys, clients, or colleagues.
14. Periodically review and update data in Clio to ensure it remains accurate and up-to-date.
15. Stay updated on new features and functionalities of Clio to make the most of the software's capabilities.
16. Ensure that all data you're recording is treated with confidentiality and follows your firm's privacy policies.

Task | Ordering Medical Records and Making Follow-Up Calls

Description of the Task: This task involves efficiently placing orders for medical records and proactively making follow-up calls to ensure the timely retrieval of essential medical documentation. The process contributes to comprehensive case preparation and facilitates smooth communication between medical providers and legal professionals.

1. Collect all relevant details for the medical records you need to order, including patient names, dates of treatment, medical facility information, and any required authorization forms.
2. Fill out any necessary authorization forms or request letters required by the medical facilities to release the records.
3. Begin by contacting the medical facilities via phone, email, or their online portal to initiate the request for medical records.
4. Clearly communicate the details of the request, such as patient information, dates of treatment, and specific records needed.
5. Ask about the process, expected timeline for fulfillment, and any associated fees for obtaining the records. Note down this information for future reference.
6. If authorization forms are required, send them via email, fax, or upload them to the medical facility's portal as requested.
7. Keep detailed notes of your communication with each medical facility, including the date, time, person spoken to, and any important details discussed.
8. If the records are not received within the expected timeframe, make follow-up calls to the medical facilities.
9. Inquire about the status of the request, whether the records have been located, and if they've been sent or are still in process.
10. If there are delays or issues, inquire about the reason and ask for an updated timeline for receiving the records.
11. Communicate with clients or attorneys to keep them informed about the progress of the medical records request.
12. Keep a centralized tracking system or spreadsheet to log the status of each medical records request and follow-up action taken.
13. Once the medical records are received, verify their accuracy and completeness.
14. Inform clients, attorneys, or any other relevant parties that the medical records have been obtained.
15. Document the completion of each medical records request in your tracking system.
16. Ensure that all patient information and medical records are handled confidentially and in accordance with privacy regulations.
17. Evaluate the process periodically to identify areas for improvement in efficiency and effectiveness.



ADMINISTRATIVE

Task | Adding Page Numbers to Medical Records

Description of the Task: In this task, medical records are meticulously organized by sequentially numbering their pages. This ensures easy referencing, accessibility, and accuracy when navigating through extensive medical documentation. The process contributes to a streamlined workflow for legal professionals and enhances the overall organization of case materials.

1. Collect all the medical records that need page numbers. Make sure you have the original documents or digital files.
2. If the medical records are in digital format, open the appropriate document editing software, such as Adobe Acrobat or Microsoft Word.
3. Decide on the numbering format you want to use for page numbers (e.g., "Page X of Y" or just "X"). This might depend on the document's length and your client's preferences.
4. In your document editing software, locate the feature that allows you to insert page numbers. This is usually found in the "Insert" or "Header & Footer" menu.
5. Use the insert page numbers feature to add page numbers to the medical records. Select the numbering format you've chosen.
6. Choose where you want the page numbers to appear on the pages. You can usually customize the placement, alignment, and font size.
7. Apply the page numbering to all the pages in the medical records. This might be done automatically by the software.
8. Review the medical records to ensure that the page numbers are correctly added to each page. Make any necessary adjustments.
9. If you're working with digital files, save the updated documents with the added page numbers. If you're working with physical copies, consider photocopying or scanning the documents with the added page numbers.
10. Ensure that the page numbering is consistent across all documents and that no pages are skipped or duplicated.
11. If needed, communicate with relevant parties (clients, attorneys, colleagues) about the updated medical records with page numbers.
12. Document the task completion in your workflow management system or tracking tool.
13. Ensure that you handle the medical records with care and maintain the confidentiality of sensitive information.
14. Reflect on the process and see if there are ways to streamline or improve the page numbering process for future tasks.

Task | Sending External Emails

Description of the Task: This task involves composing and sending emails to recipients outside the organization. It requires effective communication skills and attention to detail to ensure clear and professional correspondence. From client communication to partner collaboration, sending emails outside the firm facilitates effective information exchange and supports various business relationships.

1. Collect all necessary information for the email, including recipient's email address, subject, and content.
2. Open your email client (such as Gmail, Outlook, or a similar platform) and click on the "Compose" button to start a new email.
3. Enter the recipient's email address in the "To" field. If there are multiple recipients, separate their email addresses with commas.
4. Write a concise and informative subject line that accurately represents the content of the email.
5. Compose the email message, keeping it clear, professional, and to the point. Ensure that it includes all necessary information or attachments.
6. If you need to include attachments, use the email client's attachment feature to upload the files.
7. Carefully proofread the email for grammar, spelling, and clarity. Make sure all details are accurate.
8. Use appropriate formatting, such as font styles, bullet points, or headings, to make the email content more readable.
9. Preview the email to ensure it looks as intended and that all elements are correctly formatted.
10. If required, add your virtual assistant's email signature to the email.
11. Verify that any attachments you intended to include are attached to the email.
12. Double-check the recipient's email address to ensure accuracy.
13. Click the "Send" button to send the email to the recipient(s).
14. Depending on your workflow, you may want to archive or save a copy of the sent email in a designated folder.
15. If you're expecting a response or need to follow up, make a note of the follow-up date and set a reminder.
16. Record the details of the sent email in your task management or tracking system.
17. Ensure that the tone and content of the email reflect professionalism and align with your firm's communication standards.
18. Handle any confidential information securely and follow your firm's privacy guidelines.
19. Stay updated on best practices for email communication and continually improve your email writing skills.



FINNANCE

Task | Compiling and Reviewing Billing and Invoice Entries

Description of the Task: This task involves gathering and assessing billing and invoice entries to ensure accuracy and completeness. It encompasses checking billing details, itemized charges, and relevant information before finalizing invoices. By meticulously reviewing these entries, organizations maintain financial transparency and uphold quality standards in their billing processes.

1. Collect all relevant billing and invoice entries, which may include invoices from vendors, service providers, and other sources.
2. Organize the entries chronologically or by category to make the review process more efficient.
3. Check each entry against the supporting documentation to ensure that the details match, including dates, amounts, and descriptions.
4. Flag any discrepancies or inconsistencies between the entries and the supporting documents.
5. Cross-reference the billing rates or unit costs with agreed-upon rates to ensure accuracy.
6. Verify the calculations for subtotals, taxes, discounts, and totals to confirm accuracy.
7. Review the description of goods or services provided to ensure it aligns with the work performed.
8. Ensure that the entries have been approved and authorized according to company policies.
9. Identify and address any duplicate entries that may have been inadvertently included.
10. Compare the billing entries against any relevant contracts or agreements to ensure compliance.
11. If any entry appears unclear or questionable, communicate with the relevant parties to seek clarification.
12. If applicable, cross-reference the billing entries with the budget to ensure that expenses are within the allocated limits.
13. Create a summary report that outlines the reviewed entries, noting any discrepancies or issues that need resolution.
14. Communicate the review findings to the appropriate stakeholders, such as the finance team or the vendor/supplier.
15. Update the billing and invoicing records with any corrections or adjustments.
16. Keep a record of the reviewed entries, including the review report, for future reference and auditing purposes.
17. Reflect on the review process and identify any areas for improvement to enhance accuracy and efficiency.