

**advice<sup>UK</sup>, in partnership with the Law Centres Federation and Pivotal Integration Ltd brings you the new advice case management system, developed by and for Advice and Law Centre Workers**

## ***AdvicePro***

### **The System**

*AdvicePro*, available from summer 2007, provides a comprehensive casework and business solution for independent Advice Centres and Law Centres®. The system provides an effective and efficient on-line case management system with the ability to retrieve and analyse data and meet the latest requirements of funders and regulators – such as the Legal Services Commission.

*AdvicePro* is a secure web based application, all data is held centrally, with no requirement for software installs. Information is 'real time'; there is no need for synchronisation of data. The system can be accessed via multiple devices e.g. personal computers, laptops and if required, via mobile devices such as Personal Digital Assistants (PDA's), Smart Phones etc. The system is web-based; it can be accessed by office, home and outreach workers and permits whole case transfer between organizations for referral purposes – the perfect solution for integrated advice partnerships.

Being web-based also provides the advantage that key statistical information can be collected across the advice<sup>UK</sup> and LCF networks, while individual agency statistics and case records remain confidential. For the first time our networks will have the sort of national data on cases and casework trends that has been hitherto only been available for CABx.

Versions of *AdvicePro* will be available to suit your setting – whether you provide generalist advice on a range of topics, advise students or provide specialist advice, perhaps with an LSC contract. Special versions of *AdvicePro* incorporate the latest thinking and Adviser needs. *AdvicePro Debt* is a money advice case management system that adopts the money advice best practice guidelines, and is consistent with the Common Financial Statement from Money Advice Trust and the British Bankers Association. The system complies with the DTI's Face-to-Face debt advice project and the Scottish Executives' financial inclusion reporting requirements.

The system will be competitively priced, starting at around £300 and rising to around £5,000, depending on organisation size and features required. Comprehensive user training is available at discounted rates for members.

### **The User**

*AdvicePro* is a dynamic system; the system has the capability to evolve as the needs of the Adviser change. Adviser user groups coordinated by advice<sup>UK</sup> and LCF will influence how changes to the system occur. As the system changes, there is no requirement for client upgrades, ensuring that all agencies use the same version of the system. This certifies that all data analysed from the system is consistent, reliable and valid.

*AdvicePro* provides a user-friendly environment and the following benefits and features:

- ✓ Storage and retrieval of detailed case information
- ✓ Full case history of client/adviser/third party interactions
- ✓ All information and letters are stored within the system, ensuring that all data is held in one central, secure repository
- ✓ Comprehensive notes feature allows for the effective management of case notes
- ✓ Complete suite of standard letters, with full editing capabilities and the functionality to create agency specific templates
- ✓ Integrated postcode finder, saving time and improving accuracy entering address details
- ✓ Reporting capabilities at the touch of a button, allowing performance and statistical information to be generated quickly and efficiently
- ✓ Agencies only have access to their own casework
- ✓ Managers have the capability to manage the allocation of cases within their own agency
- ✓ Agency Managers Console allows managers certain administration rights, to manage user accounts and assigning case work
- ✓ Reduced administration time, improved efficiency of advisors - freeing their time to focus on the needs of the client

### **Be Part of the *AdvicePro* Revolution**

Project partners are working with Advice and Law Centre Workers to make sure *AdvicePro* fully meets your needs. To get involved in this important project, gain early access to the system and possible price discounts, or simply register interest, log on to [www.advicepro.org.uk](http://www.advicepro.org.uk) or return the form overleaf.

<b>Name of organisation:</b>		
<b>Main contact name</b>		
<b>E-mail address</b>		
<b>Mailing Address</b>		
<b>Advice network membership (tick all boxes that apply)</b>		
<input type="checkbox"/> Law Centres Federation	<input type="checkbox"/> advice <sup>UK</sup>	<input type="checkbox"/> DIAL UK
<input type="checkbox"/> Youth Access	<input type="checkbox"/> Age Concern	<input type="checkbox"/> Citizens Advice
<input type="checkbox"/> advice <sup>NI</sup>	<input type="checkbox"/> Other (please specify)	<input type="checkbox"/> None
<b>Subjects advised on (tick all boxes that apply)</b>	<b>Generalist</b>	<b>Specialist</b>
Consumer rights	<input type="checkbox"/>	<input type="checkbox"/>
Community Care	<input type="checkbox"/>	<input type="checkbox"/>
Debt/Money	<input type="checkbox"/>	<input type="checkbox"/>
Education	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>
Energy	<input type="checkbox"/>	<input type="checkbox"/>
Environment	<input type="checkbox"/>	<input type="checkbox"/>
Family	<input type="checkbox"/>	<input type="checkbox"/>
Health	<input type="checkbox"/>	<input type="checkbox"/>
Housing	<input type="checkbox"/>	<input type="checkbox"/>
Homelessness	<input type="checkbox"/>	<input type="checkbox"/>
Immigration/nationality	<input type="checkbox"/>	<input type="checkbox"/>
Asylum	<input type="checkbox"/>	<input type="checkbox"/>
Mental Health	<input type="checkbox"/>	<input type="checkbox"/>
Planning	<input type="checkbox"/>	<input type="checkbox"/>
Welfare Benefits	<input type="checkbox"/>	<input type="checkbox"/>
Prisoners' rights	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>
<b>Number of expected system users (include all Advisers, Caseworkers, Solicitors, Supervisors and Administrators who would need access to AdvicePro)</b>		
<b>We would like to attend a demonstration and feedback workshop</b>	<input type="checkbox"/> Birmingham 8 <sup>th</sup> June <input type="checkbox"/> London, 13 <sup>th</sup> June <input type="checkbox"/> Manchester, 18 <sup>th</sup> June	
<b>Name of person who will attend, if different from above</b>		
<b>We would be interested in being a pilot user of AdvicePro</b>	<input type="checkbox"/>	
<b>We would be interested in having a member of staff trained to be an AdvicePro approved trainer (i.e. training other users for a fee)</b>	<input type="checkbox"/>	

Return to AdvicePro, advice<sup>UK</sup>, 12<sup>th</sup> Floor, New London Bridge House, 25 London Bridge Street, London SE1 9SG

**Data protection statement** Information submitted in this form will be stored and processed electronically for the purposes of delivering services, marketing, supplying information and to enable statistical analysis. Data may be passed to other parts of the organisation, partner organisations/companies or contractors operating on our behalf to enable this to take place. Please contact us if you have any questions.