

Liz's & Case Managers' Workflow

1. Liz reaches out to Law Firms through the Web, Telephone or email. MARKETING/ OUTREACH
2. Liz fills out the Lawyers Registration card on the QOLAE Admin Portal. The fields are: Law Firm Name, Contact, email and telephone number, which, once entered, trigger a PIN Number which is autogenerated and added to the Lawyers Tracking Database. Buttons added from this first card to call up the Lawyers Tracking Database (LTDb).
3. There are Status updates, initial contact date, follow up fields, next steps, notes and a document repository for Liz's CV, Addenda and Terms of Business. Etc. within this LTDb.
4. Once the Lawyers email Liz to request for her CV and Terms of Business, this sets Liz's Workflow in motion.
5. The tick box within the Lawyers Tracking Database generates a clickable pin in the footer of the title page of the TOB and on page 20 of the TOB, as well as populating the name of the Law firm in the title page and the signature placeholders and changing the pin number within the Introductory email letter to a clickable/hyperlink format.
6. The CV, TOB and Addenda along with an Introductory letter are sent to the Law firm once the 'Send documents' box is ticked.
7. Liz uses the LTDb to follow up as necessary.
8. When the Lawyers decide to engage Liz & QOLAE, then they click on the link and commence their Lawyer's workflow.
9. Liz is sent a notification as soon as payment is made on the portal.
10. Once the Lawyer enters, the client details into the Consent form, Liz has access to the client's data on the INA Referral, the INA form, the INA Checklist the INA report.
11. Liz immediately calls the Client (Service User/Patient) to introduce herself and field any questions or concerns about the Consent form. She provisionally books an INA visit appointment with the client/Patient.
12. Liz will have entered details on the Readers portal/workspace and once Consent has been sent off, she will tick the box that autogenerates a reader specific PIN no and emailed to the Readers. NOTE THAT READER WORKFLOW IS SEPARATE. NDA will be available for signing digitally on the portal for the Readers once they log on to the system and have gone through the 2 way/MF authentication system. Liz's automatic signature will also be applied.

13. Once consent is received Liz's signature will be automatically applied and the INA Process will commence. Liz then has access to the Medical notes and documents and goes through all of this meticulously. Some of the details in the notes will be added to the INA form.
14. The Lawyers will be informed of what next in their Final email.
15. Liz fills out the INA Checklist in preparation the day before and then goes to see the client at their home and completes the INA Form, takes pictures and recordings. Some of which may be uploaded to the portal on her arrival back to her office.
16. The INA Form also populates some of the data across to the INA Report.
17. Liz will then do her research and make phone calls, medication requests from the GP or Specialist Nurses, Physio's, physicians and Surgeons etc.
18. Once all information has been gathered, she will complete her report with recommendations for the client's Rehabilitation and overall healthcare needs.
19. A first redacted draft will be sent to the first reader (who is not medically trained), the amended copy must be returned within 24 hours.
20. A second draft will be sent to a Nurse or Doctor and the copy must be returned within 24 hours.
21. The final draft will be amended, corrected and signed by Liz and then added to the Lawyers portal in a secure environment. An email is triggered and the lawyer is sent a link to access the final report, which they can download.