LegalServer Client GoLive Checklist

This document is a starting point for your team during the GoLive Phase. Please feel free to download it and customize it for your use as part of the LegalServer GoLive process.

Data Validation

Run some basic reports to make sure cases migrated properly; open cases report, closed cases report, staff time reports. You should also do a side by side data analysis of several cases in your old system and in your new system.

- ❏ Run “Imported Staff User Data” and “Imported Pro Bono Users” (if applicable) reports and confirm user data corresponds to the source data.

  Check especially for duplicate users (i.e.: bjones and bjones2), and make sure that one user account is disabled- note, this may not be the one labeled ‘2’. Check for case assignments and timeslips in the user record before deciding which to inactivate.

- ❏ Run “Imported Case Data” Report and confirm that case assignments (primary and additional assignments) correspond to the source data.
- ❏ Run “Imported Cases to Assigned Pro Bono” report and confirm that cases are properly assigned to pro bono advocates.
- ❏ Run “Imported Timeslip Data” report to confirm that timeslip information corresponds to the source data.
- ❏ Run “Imported Case Financial Info” report to confirm that financial information corresponds to the source data.
- ❏ Run any other reports that you have created on your demo site for data migration and confirmation.
- ❏ Side by side data analysis- compare several case profiles in LegalServer to your source data. Verify information such as: contact information, demographics, case notes, attachments, income, LSC eligibility setting, assignments, case time, etc correspond to your source data.

  Please note- some data may have been migrated, but may not appear on your profile, unless they were added to your profile during the configuration process. Please be comfortable adding fields to your profile prior to your go live, and confirm that all desired fields are on your demo profile.

- ❏ Run “Imported/Other Matters” report to confirm that all outreach information corresponds to the source data.
- ❏ When reporting data import issues, follow the guidelines in the [Data Import Ticket Tracking Guide].

Clean Up

- ❏ Intake Validation- Run through a test intake to make sure everything looks as it should for users. This can be tested with a real intake.
- ❏ Auxiliary Page Validation- Confirm all your auxiliary pages are present and work as intended.
- ❏ Clean Up Lookups- Your project planning Google Worksheet has a list of common lookups and their URLS for you to use in tracking your lookups and changes made in demo. You’ll need to merge values that came over in your final data import, which were added to the site-default list. Some of the values may have come in as deactivated, allowing you to choose which values you want to display in the lookups. Our help site has

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more information on lookups, merging, batch editing etc- http://help.legalserver.org/home/site-admins/lookup-lists.

- ❏ Branch Logic/Guided Navigation - Review any Branch Logic/Guided Navigation, especially ones that had logic based on any of the lookup values that needed cleanup.
- ❏ Case Closing and Outcomes- Confirm the case closing form matches your demo site, and that the outcomes lists display as expected.
- ❏ Timekeeping- Confirm the timeslips on your site (staff time, outreach time, other time etc) work as intended.
- ❏ Outreach- Confirm all customizations appear as expected on your site.
- ❏ Clean-up office list by going to the Admin Tab and searching for "Office"
- ❏ Check the Poverty Scales in Admin / Poverty Scales.
- ❏ Confirm the expected funding codes are listed in the Grants module on your site.
- ❏ Clean Up User List to make sure people who shouldn't have access to the system are marked inactive/not current and that people are assigned to the proper role (check permissions)

If Applicable:

- ❏ Make sure the appropriate filters are set on each grant so they appear or don't appear as necessary.
- ❏ Organizations – make sure referral organization types are set, legal problem code, counties, languages for the refer and reject process if applicable.
- ❏ Make sure the appropriate case questions are appearing based on the legal problem code or special legal problem code.
- ❏ If you imported or created Common Adverse parties make sure they are listed (or enter them) in Admin->Common Adverse Parties.
- ❏ Check the configuration for any additional modules -- SMS, SharePoint, Immigration Forms, etc.

<u>Clean-up Tools:</u>

- ❏ Demo site – You always have access to the demo site as a reference for lookup values, document templates, or any other specific configurations which wouldn't be included in the copy process.
- ❏ Data Document - Questions regarding where a certain field was migrated to can be answered by looking at the "LegalServer Field" column from the table view.