



SHERYL BOARDMAN is the Vice President of Marketing for Santa Clara County Legal Professionals Association and has been a Senior Account Manager for Compex Legal Services for 10 years. In her spare time, Sheryl enjoys, camping, being outdoors with her family and baking.

# How To Get The Most Out Of Your Legal Support Vendor

BY SHERYL BOARDMAN – SUBMITTED BY SANTA CLARA COUNTY LPA

Before working for Compex, I spent 10 years as a claims adjuster for various insurance companies and was a legal assistant in a law firm. Both jobs were extremely fast-paced, crazy busy which showed me how important it was to rely on legal support vendors to do my job. Whether you need subpoenaed records, deposition reporting, court filings or other such services, we are here to help obtain the information to properly handle your case. Our goal is to make your job easier and more efficient. By planning ahead, providing all the necessary information and being responsive to your inquiries, we can work together to make your case run more smoothly.



As is the case with the majority of your job, planning is key. The more notice we have, the better the results will be. Don't procrastinate in sending over orders as it will only delay the process. Some locations are very responsive while others take their time in releasing documents. Completing the request properly is also very important. The more information that is provided, the more accurate the results will be. Most medical providers will not release information without a date of birth and/or social security number. Kaiser is now requiring three identifying factors before releasing records. For example, they want at least three of the following: the Kaiser medical record number, date of birth, social security number, home address, etc. Most facilities will accept just the last four digits of the social security number as they understand the threat of identity theft. If the scope of the records is to be limited, please provide the necessary dates. Kaiser will only release the last five years of records unless you include a letter explaining why a longer time period is needed.

We strive to respond to your inquiries or requests for status whether it be via email or telephone call in a timely manner. Please keep in mind, in order for us to fulfill your orders, sometimes additional information from your firm is required. A few facilities will require original signatures on subpoenas, which will be sent to the law

firm for completion. In order for the dates to be valid, the documents need to be returned quickly. If films are requested, we send a list of all available x-rays and ask which ones need to be duplicated. Please keep a lookout for these documents, as the quicker you respond, the faster we are able to complete your order.

I cannot stress how important communication is with your vendors. I enjoy visiting my clients and putting a face to the name. Building relationships and forming that bond is very important to me. I need to hear the good, the bad and the ugly. When a Customer Service representative goes above and beyond to track down those records, or a Court Reporter does an excellent job on a depo, please let me know. Everyone enjoys hearing positive feedback and that their work is valued. On the other side of the coin, I also want to hear about any issues that might have come up. We are all human and mistakes will happen. I can't fix a problem if I don't know it exists. When an issue arises, please pick up the phone, send the vendor an email or jot down a note to discuss next time the vendor visits. Be specific with order numbers and a description of the issue(s). The feedback will help us grow and become a better company.

## HOW TO GET THE MOST OUT OF YOUR LEGAL SUPPORT VENDOR

We understand circumstances may require you to switch vendors. If that's the case, please be honest with your existing vendor. Is it something we did wrong? Is there something we could have done better to keep your business? What can we do to earn it back?

Establishing firm preferences when you first start working with a vendor is the best way to ensure orders are processed to meet your firms' expectations. For example, do you prefer to be contacted by email, phone or fax? Occasionally there are additional fees associated with

obtaining records. Set a preapproved dollar amount with your vendor to expedite the order.

Lastly, please visit the vendor tables when you're at conference. Besides offering financial support to the hosting association and some great swag, know that we enjoy coming to the conferences to meet you and learn more about your firm. It's a great opportunity to share what services we offer to help you and your firm.

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