**Accounting and Practice
Management Software Checklist**

When choosing your accounting and practice management software for your practice, it is important to address a number of considerations when making your decision. The Law Society of Alberta has approved several [accounting software vendors](https://www.lawsociety.ab.ca/lawyers-and-students/trust-accounting-and-safety/annual-reporting/) many of which have practice management tools. To find more details on the questions below, [visit the Law Society website](https://www.lawsociety.ab.ca/resource-centre/key-resources/practice-management/considerations-for-choosing-accounting-and-practice-management-software/).

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| Accounting/Trust Safety Considerations | Notes |
|  | How long does it take to generate the Trust Safety Accounting Upload? |  |
|  | Can the software produce the reports required by the Rules of the Law Society of Alberta? |  |
|  | Can the software complete trust bank reconciliations?  |  |
|  | Is trust accounting fully integrated, or is additional accounting software required for business accounting transactions/reports? |  |
|  | Can the system be set up with specific user roles and related access?  |  |
|  | Is there a Matter to Matter transfer option? |  |
|  | How will data migration occur when you switch software?  |  |
|  | How can you submit the Trust Safety Accounting Upload if your law firm switches software mid-year?  |  |
|  | If you switch software, can you still access the last activity date for client matters?  |  |
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| Practice Management Considerations | Notes |
|  | Does the software target a specific firm size? |  |
|  | Does it have a conflict management system?  |  |
|  | What does client intake look like? Can the client complete forms remotely? |  |
|  | Does it have a document management system (DMS)? |  |
|  | What is the capacity of the DMS?  |  |
|  | Is there capacity to save open and closed files in the DMS? |  |
|  | Is there a reliable calendar and recall system that easily allows for tracking of tasks, important dates and limitations? |  |
|  | Is there mobile access to the calendar? |  |
|  | Does it have a client portal? |  |
|  | Are there options to help manage email?  |  |
|  | Does it have workflow automation? |  |
|  | Does it have matter management? |  |
| Practice Management Considerations | **Notes** |
|  | Is there a billing system and billing templates?  |  |
|  | Is there time tracking functionality?  |  |
|  | Can you track expenses and disbursements? |  |
|  | Does the software provide payment options for your clients? |  |
|  | What integrations are possible? Does it integrate with software that you are using or would like to? |  |
|  | Is there ability to track and analyze metrics? |  |
|  | Is training and customer support available? |  |
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| **Technical Considerations** | **Notes** |
|  | Is the system secure? |  |
|  | Does the system use multi-factor authentication (MFA) or other security methods to prevent unauthorized access? |  |
|  | Will the system be storing personal information? |  |
|  | How quickly will the vendor notify you in the case of a security incident or privacy breach? |  |
|  | Where will data be stored (i.e., will it be stored on servers in Canada or elsewhere)?  |  |
|  | How is retention, deletion, backup and export of data handled?  |  |
|  | Is the system scalable? Can it grow with your firm? |  |
|  | Is the system reliable? |  |
|  | Is the system configurable? |  |
|  | Is the system accessible for those with disabilities? |  |
|  | Does the system utilize artificial intelligence (AI)?  |  |
|  | Does the vendor outsource or sub-contract any of its development or application support and maintenance functions? |  |
|  | What initial and ongoing costs are associated with this application? |  |