

CLICKOAI LAW FIRM GUIDE 60 OF 63

Technology, Legal Aid and Access to Justice

A discussion brief for access, capacity and controls.

Use it when

technology is proposed as an answer to legal-aid pressure

Boundary

This is not legal-aid eligibility, contract or remuneration advice. Use current LAA material for each matter and contract.

Built for independent law firms in England and Wales

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1. Frame the decision

Keep the firm's record, LAA actions, evidence and billing route aligned. A system submission is not the case record.

Specific focus

Separate access aims from provider workflow, rules, exclusion and actual benefit.

Questions to answer

- For this guide: Separate access aims from provider workflow, rules, exclusion and actual benefit.
- Which contract applies?
- Who owns notifications?
- What evidence is required?
- What causes rejects?

Avoid

- outdated billing route
- notifications left unowned
- submission before evidence is complete

2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

Area	Evidence to collect	Pass condition
Contract	Current category and scope	Source identified
Record	File and cost evidence	Supports submission
System	Actions and roles	Owner monitors
Claim	Bill, counsel and attachments	Preflight complete
Reconcile	Outcome and payment	Difference resolved

Fail closed

If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change.

3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

Field	Evidence or answer
Guide focus	Separate access aims from provider workflow, rules, exclusion and actual benefit.
Category	
Contract	
System owner	
Evidence	
Submission	
Follow-up	

Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

Decision field	Record
Chosen outcome	
Reason and evidence	
Owner and approvers	
Review or expiry date	

Primary sources

[GOV.UK: Contract documents for legal aid providers](#)

[GOV.UK: Payments and processing for legal aid professionals](#)

[Legal Aid Learning: CCMS provider best practice](#)

[SRA: Accurate client accounting records](#)

Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.