LegalServer 5 Implementation Toolkit

How to Lead a Successful LS5 Rollout for Your Organization

A2J TECH

Introduction and Context

LegalServer 5 (LS5) is the biggest update to LegalServer in more than a decade. The new interface offers a modern, accessible user experience for case management. LS5 was built to keep up with rapid technology advances and to support future development, with an API-driven architecture to enable seamless integration with even more external platforms.

A2J Tech is excited to share practical information and suggestions to help your organization prepare for the transition to LS5. Beginning in November 2025, LS5 will be available on both demo and live sites. The current version, LS4, will remain supported through the end of 2026. This means you will have about thirteen months to plan, test, train, and smoothly transition to the new interface.

Inside this toolkit, you'll find guidance on strategy, training, and change management, plus common pitfalls to avoid and best practice suggestions, all based on A2J Tech's extensive experience helping legal aid organizations optimize their case management systems and workflows.

LS5 Launch Timeline

Dates and Milestones

November 6, 2025	LS5 becomes available on demo sites (open access through 2026)
November 13, 2025	LS5 becomes available on live sites (organizations opt-in when ready)
November 2025 – December 2026	Transition window (testing, training, optimization)
December 31, 2026	End of LS4 support

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Organizations can transition anytime within this period.

Best Practices and Common Pitfalls

What are some best practices my organization can implement as we transition to LS5?

1 Communicate early and regularly with staff about what's changing and why.

2 Appoint a staff user and an LS administrator (or a small committee made up of both users and LS administrators) to coordinate planning and communication, prepare trainings, and support staff in the transition period.

3 Use your demo site to test LS5 and acclimate to the new interface prior to implementing it on your live site.

4 Rely on your existing documentation so you can verify things function correctly in LS5 and reach out for support if things aren't working as expected.

5 Celebrate the upgrade as an opportunity to modernize, not just a redesign.
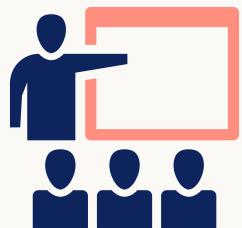
Avoid Common Pitfalls

Haphazard or last minute communication: Come up with a communication strategy and timeline, and communicate early and regularly with staff about upcoming changes.

Skipping demo testing: Use your demo site actively between Nov 2025–Dec 2026; note issues early. Contact LegalServer support at support@legalserver.org for anything you encounter that isn't working as expected.

Assuming no training is needed: The new interface is a drastic change from the current one. Even experienced LS users will need to adjust to the visual differences alone, and will benefit from a navigation refresher.

Avoid Common Pitfalls
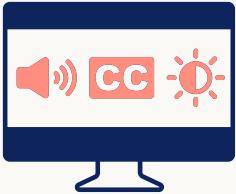
Neglecting accessibility:
Test color contrast, screen readers, and mobile responsiveness. Flag any issues you notice with LegalServer.

Not factoring in time to update internal documentation:
Since the look, feel, and navigation within LegalServer will change, your internal documentation and training materials will need a refresher. We recommend considering this while you plan for your organization's transition to LS5.

Frequently Asked Questions (FAQs)

Additional Costs Associated with LS5

1. Does LS5 require additional licensing or payment?

Answer:
No. The upgrade to LS5 does not add additional licensing costs. Organizational costs may arise from time spent to develop training, plan the implementation, and update resources, but there are no new LegalServer license fees associated with LS5.

ⓘ Note

Some optional modules and integrations, whether existing or newly released, may still require separate activation fees or ongoing maintenance costs. Check with your site administrator or LegalServer support to confirm which features are already included in your subscription.

Frequently Asked Questions (FAQs)

Time and Resource Investment

2. How much time should we set aside for the LS5 transition?

Answer:
This will vary depending on your organization's approach to implementing LS5. Because LS5 is a user-interface upgrade, not a data migration, downtime for implementation itself is almost instant, but both staff users and LegalServer administrators will need time to adjust to the visual differences between LS4 and LS5, as well as learn new icons, navigation patterns, and layouts. The time it takes to fully transition to LS5 will depend on how you structure your timeline for implementation.

Frequently Asked Questions (FAQs)

Staff Involvement and Buy-In

3. How much staff involvement should we plan for before launching LS5?

Answer:
A successful LS5 transition depends on early and consistent staff engagement. Because LS5 introduces a redesigned user experience, involvement in the planning process and hands-on exploration by both LS administrators and end-users will help build confidence and reduce frustration.

Encouraging staff buy-in from the start helps frame LS5 as an opportunity to enhance your organization's case management processes, not disrupt them. When users feel included in the process, adoption increases and change resistance decreases.

Frequently Asked Questions (FAQs)

Enabling LS5

4. Can administrators enable LS5 for selected users or roles?

Answer:
Yes. Administrators can manage who sees the new LS5 interface by following the steps outlined in the Switching Between Interfaces: Administrator and User Guide section on the <u>LS5 – Our New UI Interface page</u> on the LegalServer help site. After making this change, those users will automatically see LegalServer in the LS5 interface the next time they log in.

5. Can individual users switch between LS4 and LS5 interfaces?

Answer:
Yes. Users can switch between LS4 and LS5 at any time during the transition period. This flexibility lets users explore LS5 while retaining access to LS4 as they get comfortable with the updated design and layout. See the For Individual Users section on the LegalServer help site's <u>LS5 – Our New UI Interface page</u>.

Frequently Asked Questions (FAQs)

6. Will we need to update our internal documentation and training materials?

Answer:
Yes, because the look, feel, and navigation will change when your organization transitions from LS4 to LS5, it is a good idea to update your internal LegalServer documentation and training materials. Be sure to consider the staff time and resources this will require when you are planning your budget for 2026 and timeline for LS5 implementation.

Additional Resources

- **LegalServer LS5 Introduction**
  - Helpful information on LS5, switching interfaces, current status, known issues, and FAQs

- **Introduction to LS5 Video**
  - Watch a recorded LS5 demo from a LegalServer Community Call

- **LS5 Transition Wizard video**
  - See how to enable LS5 on your site using the LS5 Transition Wizard

- **LegalServer Help Portal**
  - This is LegalServer's general help site

- **LegalServer support inbox**
  - Have questions about the new interface? Submit a ticket from your site or email support@legalserver.org. Be sure to mention that your site is on LS5 so their team can assist you quickly.

A2J Tech is here to help!

Feel free to reach out to Laura Bluher at laurab@goa2jtech.com with any questions you may have as you begin to think about how your organization will transition to LS5.