

GOVERNED MULTI-SYSTEM ANSWERING

AI LLMQuery Connect

Case-management migrations can take months or years. Reporting cannot. LLMQuery Connect gives the firm one reporting and query layer across the systems it is leaving, the system it is moving to, and the matters that may exist in more than one at the same time.

One question across Case Systems 1, 2 & 3

SLA & timeline reporting across the transition

Duplicates resolved before totals

Read-only connections · local execution

THE PROBLEM DURING A LONG MIGRATION

The firm changed systems. The work did not.

During a phased conversion, open and historical matters can be spread across several case-management databases. Operations still needs one answer for client reporting, service levels, milestones, workloads and deadlines — even while the underlying systems disagree about names, status codes and where a matter lives.

"Which active foreclosure matters are approaching a client SLA, regardless of which system holds them?"

"Show every file with a sale date in the next 30 days across all active case systems."

"How many active matters does the firm really have — without counting migrated cases twice?"

"Which migrated matters have a different status, attorney or milestone date in the old and new systems?"

One Business Vocabulary

LLMQuery maps each system to common meanings such as Case, Client, Status, Referral Date, Sale Date and Attorney — so users do not need to know three schemas.

Safe Multi-System Totals

If overlap is possible, LLMQuery resolves matter identity before a count, sum or distinct total is presented. A copied matter is not silently counted twice.

SLA & Timeline Coverage

Questions can span referral, title, service, complaint, judgment, sale and other milestones even when each case system stores those dates differently.

Source Always Visible

The answer can show the source breakdown and any coverage gap. If one system is unavailable or a concept is unmapped, LLMQuery does not disguise a partial answer as a firm-wide total.

HOW IT WORKS

One question. Three systems. One controlled query plan.

The model understands the business question once. LLMQuery's own code — not the model — decides how to execute it safely against each connected system.

1 Connect each system read-only

Case System 1, Case System 2 and Case System 3 remain independent. LLMQuery runs ordinary read-only queries against each; no cross-database linked server is required.

2 Translate to one canonical meaning

Different table names, status codes and milestone fields are mapped to the firm's shared vocabulary and business rules during setup.

3 Choose the safe execution path

If the systems hold different matters, results can be combined directly. If the same matter may appear twice, LLMQuery requests identity keys first, resolves overlap, then aggregates.

4 Return the answer with coverage

The firm sees the consolidated answer, the contribution from each source, and any limitation that would make a firm-wide total unsafe.

Question	"How many active foreclosure matters are outside the client's first-action SLA?"
Canonical meaning	Active foreclosure + client SLA definition + first-action milestone + elapsed days
Planner decision	Can the same matter exist in more than one source? If yes, resolve identity before totaling.
Sources	Case System 1 · Case System 2 · Case System 3
Answer	One firm-wide result, with source and coverage details retained.

● Built for SLA, deadline and milestone reporting

A transition does not stop servicer reporting or internal management. LLMQuery can apply the firm's definitions consistently across systems even when the physical fields differ.

- ✓ Referral-to-first-action and other elapsed-time SLAs
- ✓ Title, service, complaint, judgment and sale milestones
- ✓ Upcoming deadlines and overdue tasks across active systems
- ✓ Client, attorney, office, state and case-type workload reporting
- ✓ Migration reconciliation — what moved, what did not, and what changed

Business meaning stays constant. "Active," "sale scheduled" or "first legal" can have one firm definition even when each source implements it differently.

● Identity is resolved before anything is totalled

The dangerous design asks all three systems for *COUNT(*)* and adds the answers. Once duplicates are buried inside those numbers, nothing downstream can find them.

Deterministic matches can be automatic

Migration reference, prior file number, loan number plus client, servicer file number or another trusted cross-reference can establish that two rows represent the same matter.

Probable matches are never silently merged

Borrower, property, dates or similar clues can create a review candidate, but a possible match remains separate until a person confirms it. Refilings and second liens must not disappear into a fuzzy merge.

THE CONNECT IS A COORDINATION LAYER, NOT A NEW CASE SYSTEM

Leave the case data where it already lives

LLMQuery Connect does not need to become another system of record. The source databases remain authoritative. The Connect can maintain the mappings, business definitions and narrow identity index needed to reconcile the same matter across sources, then run the actual queries locally against the systems that own the data.

3

case systems can participate in one business question

1

canonical vocabulary for the AI and the firm's rules

0

need to expose three raw schemas to the user asking the question

● Primer exposes coverage before users rely on it

Reachability is not the same as reporting coverage. An older system may contain cases and status but not bankruptcy milestones, fee detail or the same SLA timestamps as the current system.

Business concept	Case 1	Case 2	Case 3
Cases / status	✓	✓	✓
Referral / milestone dates	✓	✓	✓
Client SLA fields	Map	✓	✓
Fee detail	—	✓	✓

A missing concept is shown as a coverage limitation — not quietly omitted from a "firm-wide" answer.

● Reconciliation turns migration uncertainty into a map

Before unified totals are enabled, a reconciliation pass can establish how the systems overlap and where mappings need calibration.

- ✓ Which matters appear in each source
- ✓ Deterministic matches and unmatched matters
- ✓ Status, client, attorney and milestone disagreements
- ✓ Client-name variants and status-code mapping issues
- ✓ A reviewed identity map for later firm-wide reporting

A partial answer is not presented as a total

If Case System 2 is offline, an identity relationship has not been established, or one source does not contain the concept being asked about, LLMQuery can return the available source breakdown and explain the gap — but it does not manufacture a single firm-wide number.

Case System 1

Case System 2

Case System 3

- Deduplicate before COUNT or COUNT DISTINCT
- Rewrite averages using the underlying sum and count
- Apply source precedence only after identity is established
- Keep per-source provenance through the final answer
- Refuse a consolidated result when it cannot be computed safely