Disbursing a settled case in CASEpeer

How the disbursement runs in CASEpeer today, and what changes when Disbo is connected · October 2026 · Disbo connects to CASEpeer (Live)

How it runs in CASEpeer today

The case is in CASEpeer. The money is not. Once the client signs the settlement statement, the amounts leave the case system and are re-typed somewhere else: a spreadsheet, the accounting system, check stock. Six hand-offs, each one a place where a number can change.

Step	By hand	With Disbo connected to CASEpeer
The statement is signed	The client signs the settlement statement; the signed copy goes in the case before anything else happens.	Same. Disbo reads the signed statement from the case; it never generates one.
Amounts move to accounting	Someone re-types payees and amounts from the statement into the accounting system or a spreadsheet, and checks the trust balance for the case.	Nothing is retyped. Payees and amounts come from the case; the case's trust balance is on the screen.
Checks are written	Each check is printed or handwritten, signed by a partner, and matched to its enclosure (lien release, settlement letter).	Staff prepare the payouts in one list; the signer approves once; checks print on the firm's own account.
Envelopes are stuffed and mailed	Documents are copied, folded and mailed; ACH payees are called for bank details.	Printed and mailed with the documents attached per recipient; ACH payees link a bank once.
Tracking	Staff answer "did the doctor get paid?" by checking the bank, the mail log and the case.	Status per recipient on the case in CASEpeer: queued, sent, delivered, cashed.
Posting and reconciliation	Each payment is posted to the client ledger and the books; the trust account is reconciled at month end.	Posted to the case and the books as each payment is issued; reconciliation export in beta.

Anonymized client results: a seven-payee disbursement took a firm about 2 hours by hand and about 30 minutes in Disbo; a firm found $200,000 sitting in trust once balances were shown by case.

With Disbo connected: what moves, and which way

CASEpeer stays the case system. Disbo is the payment record. Each item below is stated for CASEpeer specifically; the connection is live today.

CASEpeer → Disbo · what comes in	Disbo → CASEpeer · what goes back
• The case: name, number, type, date of loss • The plaintiff • Settlement amount • Payees on the case: providers, lienholders, referral attorney • Documents	• Payment status per recipient on the case • Check number, cleared date and check image • Case costs paid • Undisbursed funds

Write-back scope is per system. This list is CASEpeer's; the key between CASEpeer, Disbo and your books is case name plus date of loss, or your case number.

The field map

In CASEpeer	In Disbo	Used for
Case name and number	Case	Links every payment, document and status; the key into your books
Client / plaintiff	Payee (client)	Net proceeds by check or ACH
Settlement amount	Deposit to balance	Pay stays off until the statement and the payments match to $0.00
Attorney fee	Payee (firm, operating)	The fee payment from trust to operating
Referral / co-counsel fee	Payee	Paid from the fee with the client's consent on file
Case costs	Reimbursement to operating	Costs advanced come back to operating; never paid from trust directly
Providers and lienholders	Payees with amounts	Checks with the release enclosed, or ACH after a one-time bank link
Documents	Enclosures per recipient	Lien release, settlement letter, mailed in the envelope

Connected in four steps, on one call

Our implementation team does this with your CASEpeer admin on the implementation call. An hour or two; most firms send their first payment within two weeks.

01 · Connect with your CASEpeer API key
Our team enters it on the call.

02 · Map the fields
Plaintiff, settlement, payees.

03 · Payment status on the case
Status per recipient appears on the case.

04 · Pull one case and send $1
Check every field landed, then a one-dollar check from operating. Then the first real disbursement, with our team on the call.

Bring to the call

- A CASEpeer admin
- An API key
- Clean payee records (or we use your accounting system's vendors)
- An email per payee

What stays where

- If payee records in CASEpeer are messy, Disbo can take payees from your accounting system's vendor list instead and keep the case from CASEpeer.
- No case numbers? Case name and date of loss is the fallback key; a case number is better.
- The client is paid by ACH 2–3 business days after approval.

Ask on the call

- Are provider and lienholder records in CASEpeer complete, or should payees come from the accounting vendor list?
- Do our cases carry a case number, or do we key on name and date of loss?
- Who holds the CASEpeer API key?

Before you disburse: the checklist

Works with or without Disbo. Run it after the client signs and before the first payment leaves trust.

☐	The settlement funds have cleared in the trust account (deposited is not cleared).
☐	The client has signed the settlement statement and the signed copy is saved to the case.
☐	Every lien amount on the statement is confirmed in writing; the letters are in the file.
☐	Medicare uses the final demand, not the conditional payment estimate.
☐	The attorney fee follows the basis in the signed fee agreement; any referral fee is disclosed and paid from the fee.
☐	Case costs are itemized from the ledger; none are estimates.
☐	The statement foots: gross – fee – costs – liens – government and subrogation – other – holdback = net to client, to the penny.
☐	Each payee has a legal name, a mailing address or a verified bank account, and the documents to enclose.
☐	Any holdback has a written release condition and a date to re-check it.
☐	The signer who will approve the disbursement is available, with two-factor set up.
☐	Every payment will be posted to the case ledger and the books on the day it is issued.

What Disbo does not do

- Generate the settlement statement. The firm prepares it in CASEpeer or from our template; Disbo reads the signed one.
- Negotiate liens or track bills. Amounts come from the statement as signed.
- Hold the money. Checks are drawn on the firm's own account; electronic payments pass through a bank partner for seconds.
- Take fees from trust. Disbo bills the firm's operating account.

Disbo connects to CASEpeer today. See the connection in a 30-minute demo: disbo.com/book-demo · Integration page: disbo.com/integrations/casepeer · Three-way reconciliation is in beta with a small group of firms.

Disbo (disbo.com). Educational material, not legal advice. Sample firm Westbrook & Vale and all figures are illustrative.