

Tech, Remote Work and More: What Estate Planners Need to Know Now

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ChronicIllnessPlanning.org

Tech, Remote Work and More: What Estate Planners Need to Know Now

By: Barron K. Henley, Esq., Partner, Affinity Consulting Group, Mary E. Vandenack, Esq., Jonathan G. Blattmachr and Martin M. Shenkman, Esq.



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A red paper airplane is shown in flight, moving from the top left towards the center. Below it, a grid of white paper airplanes is arranged in a regular pattern. A dashed line indicates the path of the red airplane. A red banner with white text is positioned in the upper right quadrant.

REMOTE WORK IS ESSENTIAL

You MUST be able to work remotely this Webinar will provide many practical tips and very specific recommendations to help you



Therefore, You Need...

PRACTICE PORTABILITY

The ability to **communicate**, **draft** documents, **work** on your practice,
and **access all case information** from **anywhere**

WORK IS A THING YOU DO,
NOT A PLACE YOU GO.



PRACTICE FROM ANYWHERE

Untethered Practice

Is it possible for you to work with **maximum efficiency when you're not at the office**? This webinar will give you lots of specific suggestions on software, hardware and practices to help you be efficient in working remotely



Untethered Practice

It is possible to have **lawyers or staff persons** work for your firm who **aren't physically present**. Some were prepared, many were forced by COVID-19 into remote work. Regardless, we'll give you tips to make it easier and more efficient.



Trend Toward Untethered Practice

Technological advances have created the ability to run a full-service law firm **without a physical office**.

The potential of a business disaster makes it a **required capability**.

Used to be a **want**, now it's a **need**.

We'll tell you what to buy and Do **NOW** to function better in the COVID remote environment

Mary/Marty will share what they have in their home offices which might be useful for attendees to consider for their offices. You can order anything online you need and have it delivered.



REMOTE WORKING CHECKLIST

Remote Work Checklist

- ▶ **Internet access** – Mary - issues with remote areas; Marty bandwidth issues
- ▶ **Mobile hardware**
- ▶ **Other required hardware to work remotely** Mary uses 3 screens; Marty uses 1 laptop
- ▶ **Mobile communications**
- ▶ **Electronic filing system and remote access** to the files – not reliant upon paper files
- ▶ **Billing & accounting with remote access**
- ▶ **Centralized, sharable client database** - case management system
- ▶ **Get documents signed remotely**
- ▶ **Security and protecting client data** when working remotely
- ▶ **Home workspace** - Separate office vs. armchair
- ▶ **New processes and procedures**

WHAT DOES THE NEW NORMAL LOOK LIKE?



A Couple of Predictions

- ▶ **Practice portability** won't be a luxury, it will be a **requirement** – **many firms are still mired in old style admin/secretaries, etc.**
- ▶ **Internet reliance will grow** – so it makes sense to have a **backup**
- ▶ **Law offices will have a more geographically diverse workforce**
- ▶ **Web meetings instead of in-person meetings** – **It's more efficient**
- ▶ **Lawyers less familiar with technology must learn it NOW!**

Maintaining Competence

[8] To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.

A red paper airplane is shown in flight, moving from the top left towards the right. A dashed grey line follows its path, curving downwards. Below the path is a grid of white paper airplanes, arranged in four rows and many columns. A red banner with white text is positioned in the upper right area of the image.

ELECTRONIC FILING SYSTEM

What's Realistic?

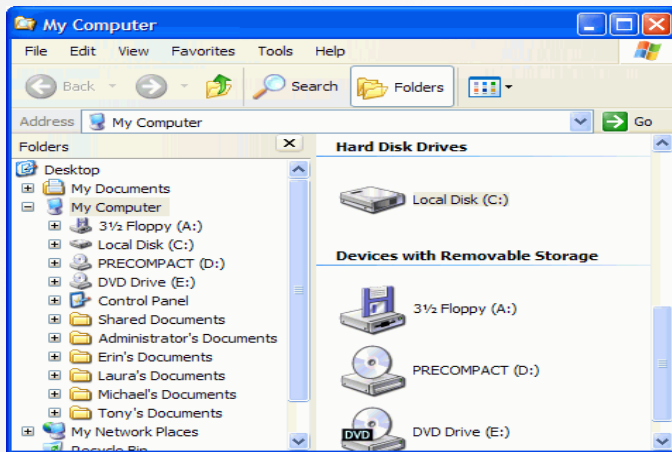
**Eliminate all paper?
Probably not**

**Reduce paper?
Absolutely**

But what do you do NOW??

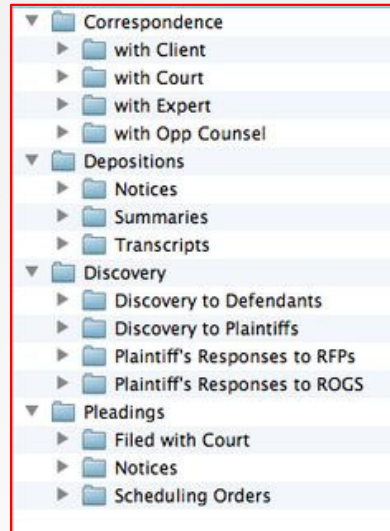
Solution

- ▶ It's fine to maintain some paper files BUT in a COVID-19 environment (and when will it end? What if there is a resurgence and future closures?) how to do you get any paper files? **Marty story of colleague – progression ... temp Redweld; Mary on going paperless**
- ▶ **But your electronic files have to be complete**



Two Basic Methods You Can Use

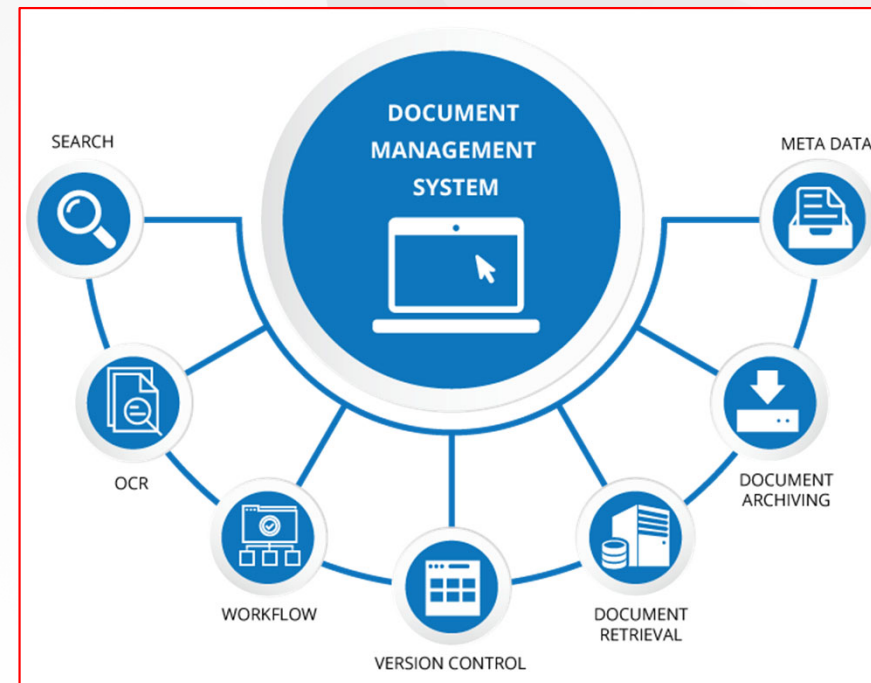
1. Plain folders + search utility



or

2. Document management system (DMS)

3. You can use both on an integrated basis



Paper Reduction Roadmap – More Long Term

1. Backup systems & security (everyone has confidence in)
2. Hardware
 - A. Desktop Scanners
 - B. Dual monitors that rotate
 - C. Tablets/ultrabooks/laptops
3. Searchable PDFs
4. Search Program or Document Management System (“DMS”)
5. If No DMS
 - A. One folder per matter
 - B. Consistent file naming convention
6. Digitize all incoming documents
7. Email must be stored outside your email program – e.g. world docs can pop up template you must fill in to save into system

1. Collaborative Technology
2. Write It Down & Provide Training



Paper Reduction Roadmap – What do you do NOW?

Backup systems & security (everyone has confidence in)

An IT Consultant may be able to add additional systems now

Hardware – your office may not be changed today but you can buy equipment for your home use NOW

- A. Desktop Scanners – perhaps smaller home models
- B. Dual monitors that rotate
- C. Tablets/ultrabooks/laptops

Searchable PDFs – you can add software now

If No DMS

- A. One folder per matter
- B. Consistent file naming convention **Mary to comment**

Digitize all incoming documents – professionals working remotely should be **can you**

Reduce mail volume e.g. use instructions for digital return of documents; Clients are OK doing this!

Required to scan or save electronically any documents currently worked on even if your

Firm is not paperless

Email must be stored outside your email program

Collaborative Technology – essential in a COVID world



STEP 1:

Bullet-Proof Backup & Security

Backup & Security

- ▶ **Redundancy critical**
- ▶ **Backup rules**
 - ▶ **No excuses**
 - ▶ **Unattended is best**
 - ▶ **Backup everything**
 - ▶ **Check the backup log**
 - ▶ **Off-site storage**
 - ▶ **No incremental backups**
 - ▶ **Run test restores**
 - ▶ **Have secondary method.**

Backup on a Budget (What You Can add NOW!)

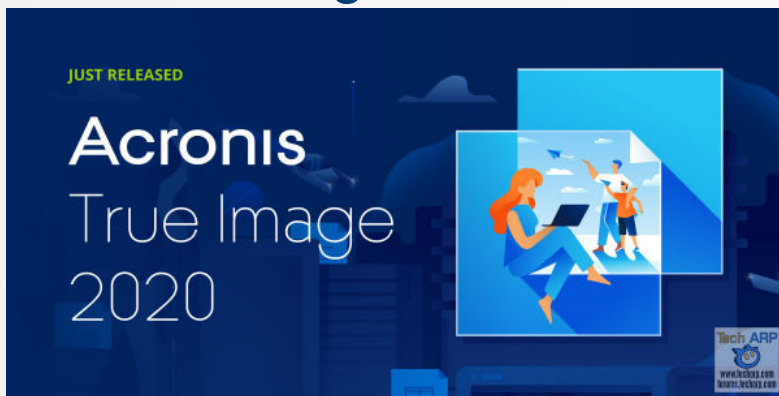
▶ **Carbonite Personal Plus**
\$72/PC/yr – unlimited storage

CARBONITE 

▶ **WD 3TB My Book Desktop External Hard Drive - \$89**



▶ **Acronis True Image 2020 - \$35** – creates a mirror image of entire hard drive



STEP 2: The Hardware



Scanners

- ▶ You may need a copier, but...
- ▶ All success stories used distributed scanning in the current environment partners and other staff should be provided with home scanners if they have any paper that they handle
- ▶ Some professionals still want to print and mark up a document or plan manually and they need to scan it **Try marking up in word; use a table of contents to create the structure documents**
- ▶ An all in one printer/scanner/copier may be best – see later



Scanners

Key features for desktop scanners

- ▶ **We prefer sheet fed v flat bed**
- ▶ **Document feeder**
- ▶ **Quiet**
- ▶ **USB connection**
- ▶ **Black & white or color, legal or letter & fast**

Recommended Flatbed Scanners

- ▶ **Xerox Duplex Combo Flatbed Scanner**
(25/50 ppm – \$224)



- ▶ **Fujitsu fi-7280** (80/160 ppm – \$1,835)



Recommended Sheetfed Scanners

- ▶ **Fujitsu ScanSnap iX1500**
(30/60 ppm – \$420)



- ▶ **Brother ImageCenter ADS-2800W**
(40/80 ppm – \$400)



- ▶ **Canon DR-C225W II** (25/50 ppm – \$412)



Recommended Sheetfed Scanners

▶ **Fujitsu fi-7160** (60/120 ppm – \$831)



▶ **Fujitsu fi-7180** (80/160 ppm – \$1,469)

▶ **Fujitsu fi-7300NX** (network scanner
60/120 ppm – \$1,070)



Recommended Portable Scanners (for those with more limited home office space)

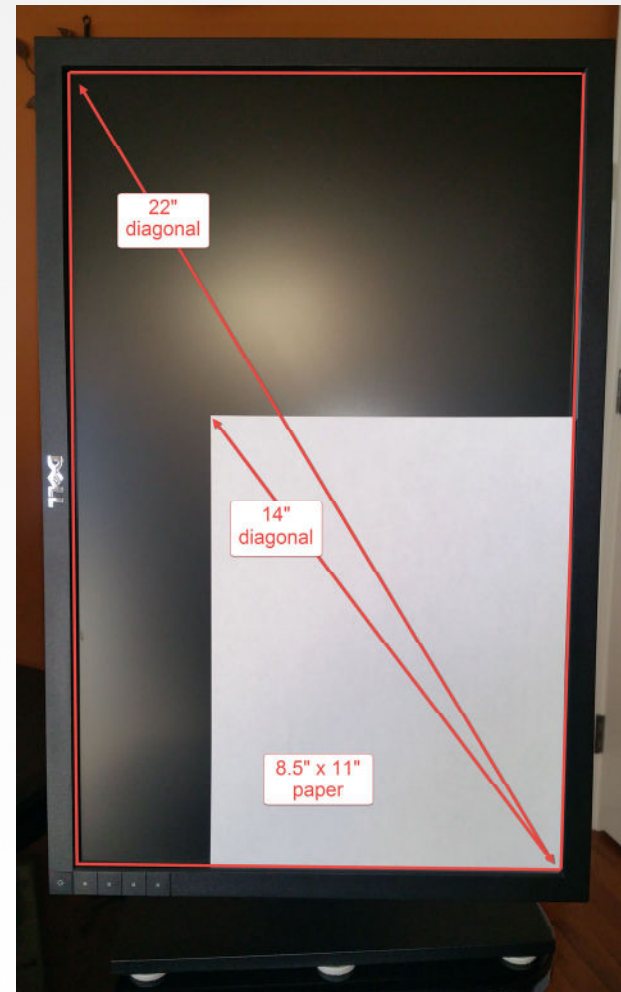
- ▶ **Fujitsu ScanSnap S1300i**
(8/16 ppm - \$248)

- ▶ **Fujitsu ScanSnap iX100**
(really slow - \$190)



Buy Monitors That Rotate

Easily read documents on screen



If Current Monitors Don't Rotate, Get a VESA Stand

Do a web search for **VESA monitor stand**



Dual Monitors Highly Recommended

\$1,000 + for a single 49" monitor x

\$280 - \$300 for dual 27" monitors x



Mobile Computer or Tablet

- ▶ You definitely need a **laptop or tablet** as your primary computer
- ▶ More on this later





STEP 3:

**Searchable
PDFs**

Scanning Software

- ▶ Digital documents must be **PDFs**
- ▶ **Portable Document Format** is a file format that captures all elements of a printed document as an electronic image that you can view, navigate, print, or forward to someone else.
- ▶ You can buy and download the software to your laptop while working remotely if you do not already have it

Types of PDFs

Image only PDFs x

- ▶ Just an image of original
- ▶ Cannot be searched for words contained inside
- ▶ Default type of PDF from scanners

Searchable PDFs (what you want) x

- ▶ Layer of searchable text behind image
- ▶ Searchable
- ▶ Indispensable

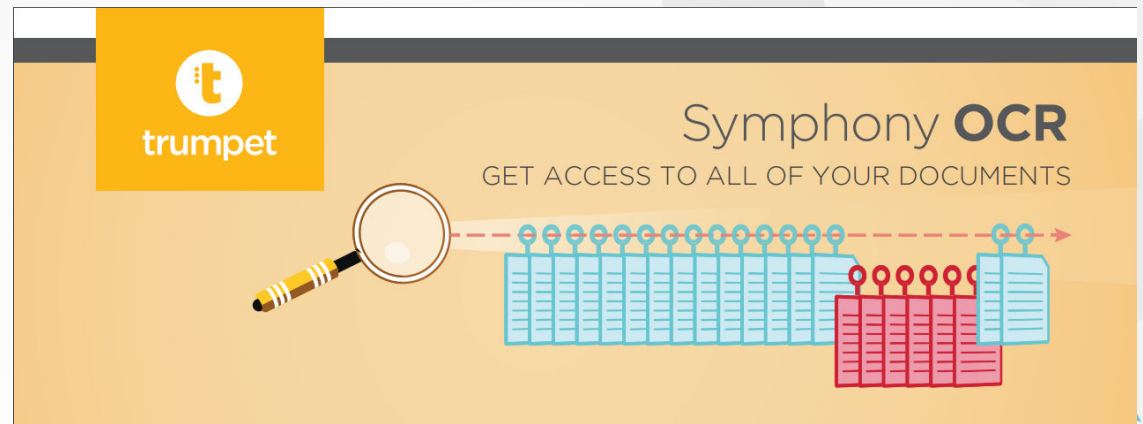
If you don't have searchable PDFs, you will have difficulty finding them in the future

If You Have Thousands of PDFs To OCR

▶ DocsCorp contentCrawler



▶ Trumpet Symphony OCR



STEP 4:

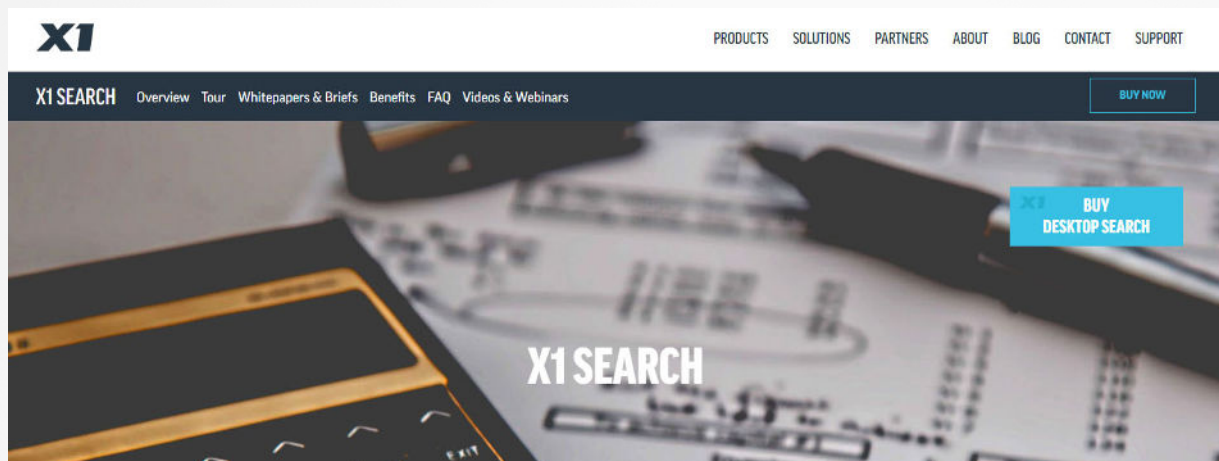
Search Program

or

Document Management System

Windows Search Software

- ▶ **Copernic Desktop Search Professional - \$56/yr x**
- ▶ **X1 Search - \$67/yr**
- ▶ **dtSearch - \$199**
- ▶ **Windows Vista/7/8/10 Instant Search**
- ▶ **Filehand**



Mac Search Software

- ▶ **Spotlight Search (Mac OSX)**
- ▶ **EasyFind: Free**
- ▶ **HoudahSpot: \$30**



Players

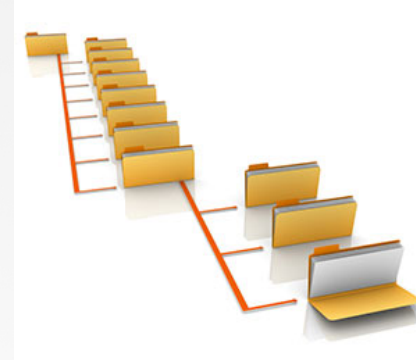
- ▶ **Worldox GX**
- ▶ **iManage WorkSite**
- ▶ **NetDocuments**
- ▶ **OpenText**
- ▶ **LaserFiche**



STEP 5: If No DMS

No DMS

▶ Consolidate folder structure



▶ Use consistent file naming convention

▶ **Mary comment on how she enforces standard naming conventions**

File Naming Conventions

▶ **Not Recommended:**

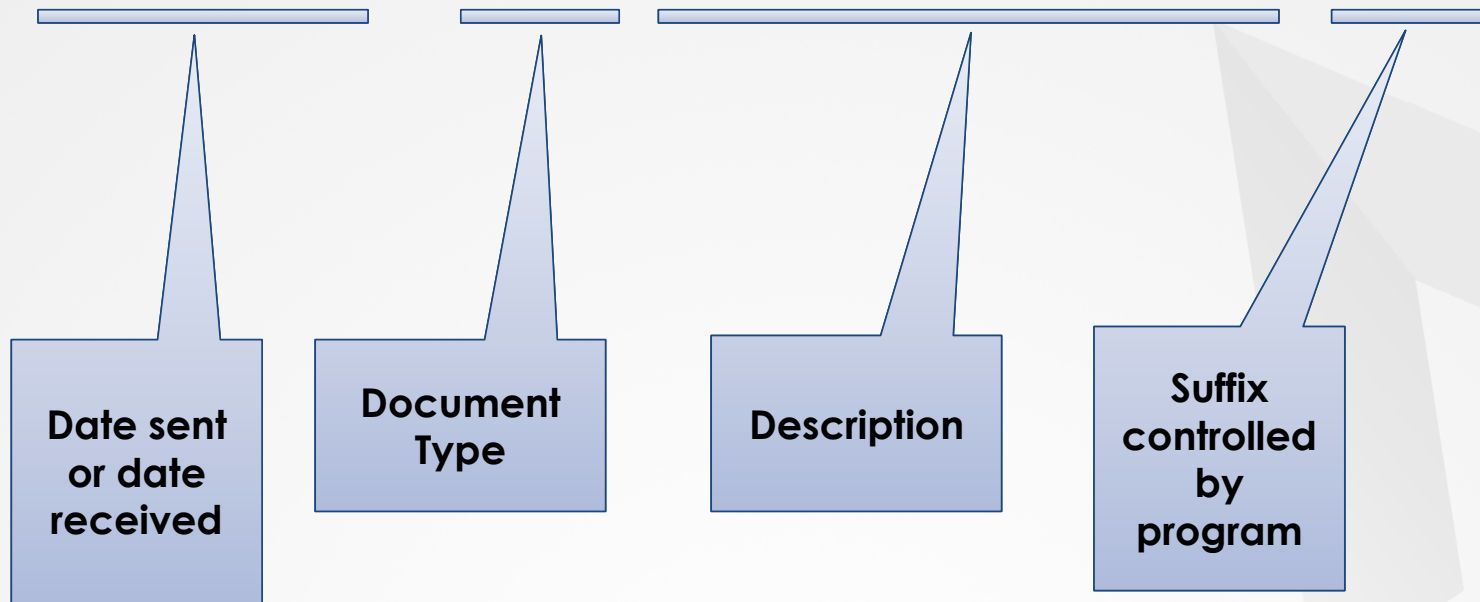
- ▶ wjcpc01.dep
- ▶ Joesmithltr.docx

▶ **Recommended:**

- ▶ 2004-10-30 - Jake Robbins Perjury Case Deposition 01.docx
- ▶ 2010-06-07 - Deed for 10011 184 St NW.docx

File Naming Conventions

2010-06-07 - Deed for 10011 184 St NW.docx



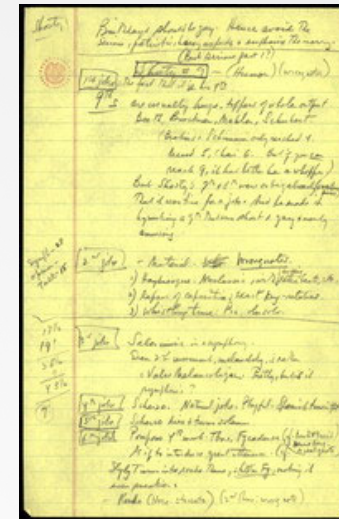
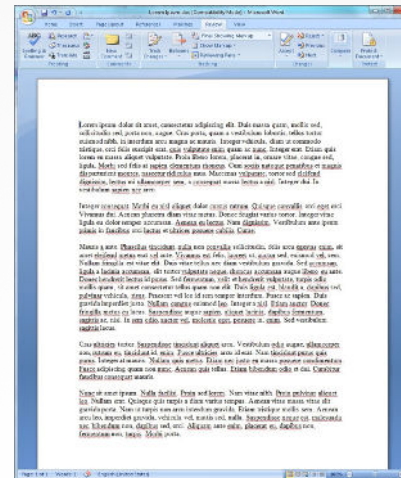
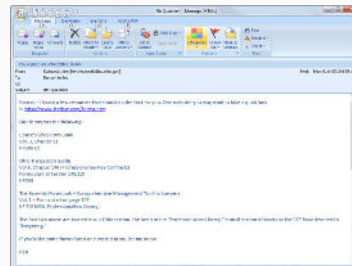
STEP 6: Digitize Everything



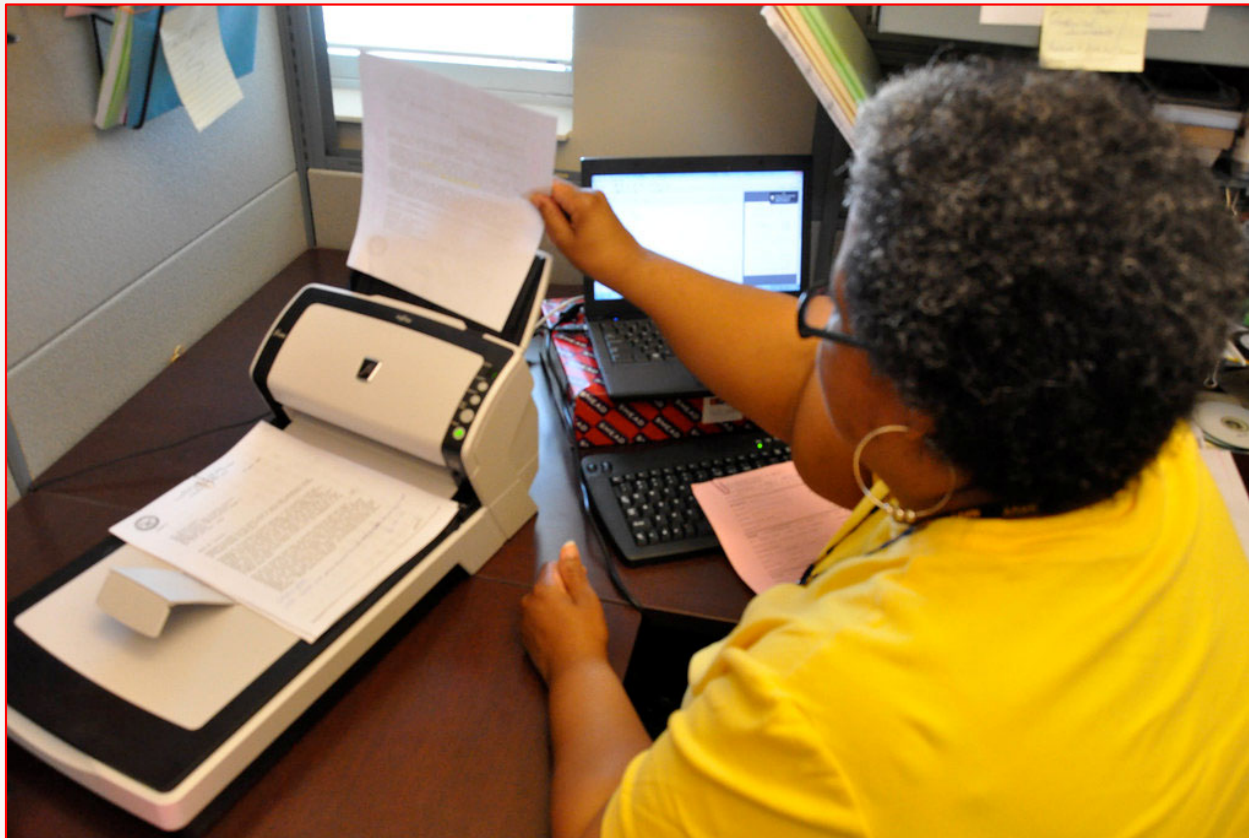
Electronic Filing System

Must hold:

- ▶ Documents created internally
- ▶ Documents received
- ▶ Email
- ▶ Email attachments
- ▶ Faxes
- ▶ Notes
- ▶ You **CAN** start now! You should!



Make your **active file digital**
(don't wait until COVID is over to start scanning)



Digitize Mail & Faxes

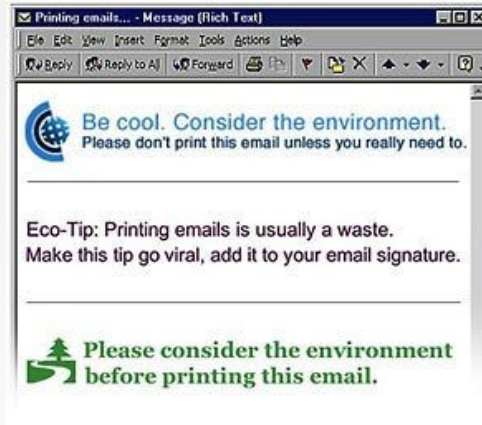
- ▶ If you have a physical fax machine in your office convert **NOW** to an internet fax service. This **CAN** be done remotely in the current environment
- ▶ Consider Internet fax service
 - ▶ www.ringcentral.com
 - ▶ www.myfax.com
 - ▶ www.efax.com
 - ▶ www.greenfax.com
 - ▶ www.onebox.com
 - ▶ www.faxzero.com
- ▶ Don't scan *everything*
- ▶ Distribute mail and let users scan

STEP 7: Email Stored Outside Email Program



Store Email Outside of Email App

▶ **STOP PRINTING** email



- ▶ Save as **MSG** or **PDF** files – or store them in a document management system
- ▶ Professionals accustomed to having staff print emails should **IMMEDIATELY** change to saving PDFs of important emails while forced to work remotely during **COVID**

▶ **If you use**



▶ **Then you need one of these because they integrate**

- ▶ **Adobe Acrobat**
- ▶ **Nuance Power PDF Advanced**
- ▶ **Foxit PhantomPDF Business**
- ▶ **Nitro Pro**

STEP 8:

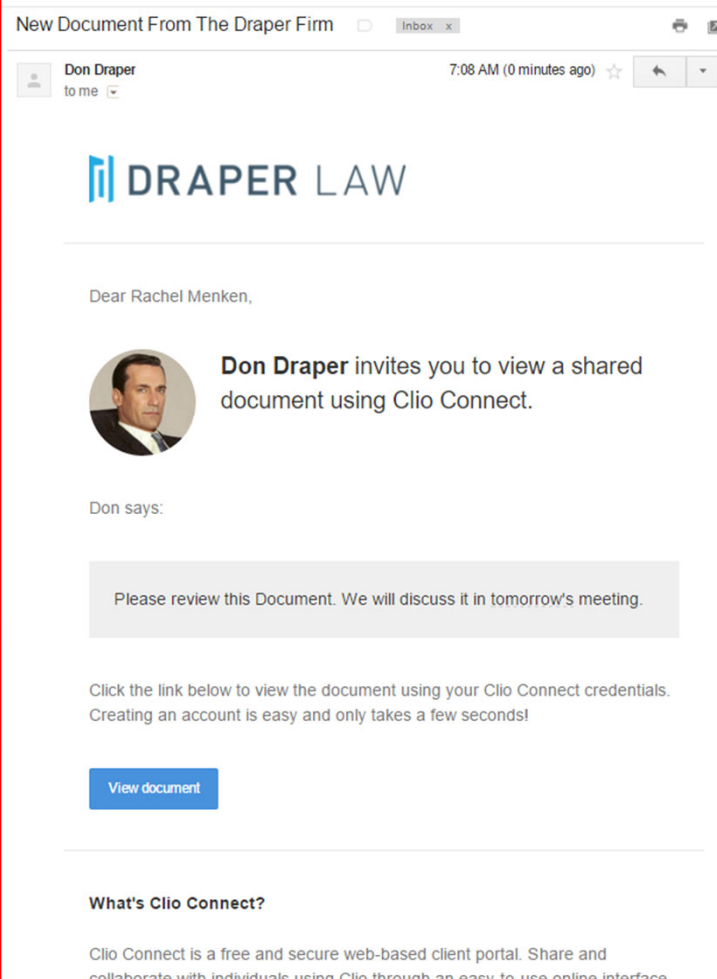
Collaborative Tools

File Sharing Tools



Many Case Management Systems Have Portals

► For example Clio Connect




New Document From The Draper Firm Inbox x

Don Draper
to me 7:08 AM (0 minutes ago) ☆ ↶ ⌵

DRAPER LAW

Dear Rachel Menken,

 **Don Draper** invites you to view a shared document using Clio Connect.

Don says:

Please review this Document. We will discuss it in tomorrow's meeting.

Click the link below to view the document using your Clio Connect credentials. Creating an account is easy and only takes a few seconds!

[View document](#)

What's Clio Connect?

Clio Connect is a free and secure web-based client portal. Share and collaborate with individuals using Clio through an easy-to-use online interface.

STEP 9:
Write it Down &
Get Trained

Training

- ▶ **Include all staff – even those who don't think they'll scan (they'll change their minds) – This can be done remotely now with a zoom meeting**
- ▶ **Training on remote work management**
- ▶ **Most important step**
- ▶ **Breaks down resistance**
- ▶ **Use the current COVID tragedy to push reluctant professionals to adapt to essential technology as they may have no choice but to do so in the current environment**

Develop Protocols

- ▶ Write down how you do it – create a **“Cheat Sheet”** for each step with screen shots to make it really EASY for a non-techie to do it
- ▶ **Marty and Mary will comment**
- ▶ Should be part of your employee manual

Now that you have an **electronic filing system,**

RELY ON IT!

Incredibly Inexpensive Storage

- ▶ **1 page of a PDF document** = roughly 30 kilobytes
- ▶ **1 gigabyte** = 1,073,741,824 bytes or 35,791 pages of text
- ▶ **1 bankers box** holds about 2,500 pages
- ▶ **1 gigabyte can store 14.3** banker's boxes of documents (so let's round down to 14)
- ▶ **3 TB USB external hard drive** = \$90
- ▶ **Therefore, a single drive could hold 42,000 bankers boxes of documents at a cost of \$0.0021 per box.**

Problems Solved

- ▶ **Remote access – especially now during COVID stay at home orders**
- ▶ **Electronic files always in the same place**
- ▶ **Lower operating costs**
- ▶ **Electronic files are easily searchable**
- ▶ **Easy to share & collaborate**
- ▶ **Easily transportable**
- ▶ **Instant data access**
- ▶ **Easy updating**
- ▶ **No storage costs.**

A red paper airplane is shown in flight, moving from the top left towards the center. A dashed grey line follows its path, curving downwards. Below the path, a grid of white paper airplanes is arranged in rows, representing a field or a network. The background is a light grey surface.

ACCESSING FILES REMOTELY

3 Basic Approaches – Use 1, 2 or all 3 Depending on your Current Status

▶ Sync files to laptop



▶ Cloud sharing or access



▶ Connect to office server or PC



A red paper airplane is shown in flight, moving from the top left towards the center. Below it, a dashed grey line indicates its path. The background is a light grey surface covered with a grid of white paper airplanes. A red banner with the text "HARDWARE CONSIDERATIONS" is positioned in the upper right area.

HARDWARE CONSIDERATIONS

Two Basic Options

▶ **PC you can take with you**

▶ **Home PC used to remotely access office systems**

(these must be secure from family members)



You Want An Ultrabook Configuration

- ▶ Resume from hibernation < 3 seconds
- ▶ Battery life > 6 hours of video
- ▶ USB 3.0, USB-C or Thunderbolt ports
- ▶ < 0.83” thick
- ▶ < 3 lbs.
- ▶ Powerful
- ▶ **Touch**
- ▶ Antivirus
- ▶ Anti-theft
- ▶ Hardware security

For example:
Dell XPS 13 in Frost White



2-in-1 Convertible

Hybrid tablet/laptop



Tablet



**Unless you're doing pretty basic stuff,
an iPad probably won't cut it**



**However, the tradeoff between a 2-in-1
PC and a tablet is negligible**



Laptop + Dock + Monitors + Keyboard/Mouse

- ▶ One laptop and docking station at home and office.
- ▶ Docking station is less costly than redundancy of multiple computers.
- ▶ Multiple computers gives you redundancy.



You Can't Assume Everyone Has A Home PC

- ▶ If everyone in your office has a desktop, they may not be able to work at home
- ▶ This is not very portable!
- ▶ Might be time to consider **laptops for everyone**
- ▶ **You can order online and have shipped directly to the homes of professionals and staff who need them NOW. You can have an IT consulting help remotely set up whatever is needed.**

Laptop Configuration Recommendation

- ▶ 13.3”, 14” or 15.6” touch screen – smaller = lighter laptop
- ▶ 16 GB of RAM (32 OK, 8 not OK)
- ▶ 500 GB or 1,000 GB (1 TB) solid state hard drive
- ▶ Biometric/fingerprint reader built in
- ▶ Windows 10 Pro (not Home) or Mac OSX
- ▶ 3 year, next business day, on-site warranty + accidental damage protection
- ▶ Intel i5 or i7 processor – 8th, 9th, or 10th gen

Deciphering Intel Processors

- ▶ i3 – i5 – i7 – i9: speed/power increments
- ▶ **Generation: current is 10th – how to tell**
 - ▶ Intel Core i7-10710U – 10th gen
 - ▶ Intel Core i7-9750H – 9th gen
- ▶ **Power Consumption:**
 - ▶ Intel Core i7-9750H – High performance graphics, uses more juice
 - ▶ Intel Core i7-10710U – Ultra low power consumption (most are here)
 - ▶ Intel Core i7-10310Y – Extremely low power consumption (uncommon)
- ▶ For a full explanation, see <https://intel.ly/2JgoHoQ>

Keyboard/Mouse Combo for Dock

External keyboard/mouse combo MK550 or MK710



1. Customizable keys
2. Comfort wave keyframe
3. Cushioned palm rest
4. Extended life battery*
5. Ambidextrous laser mouse
6. USB Receiver included

* May vary based on user and computing conditions.

Best Travel Mice

▶ **Logitech MX Master - \$60**



▶ **Logitech Anywhere Mouse MX - \$35**



Portable Printers

- ▶ HP OfficeJet 200
- ▶ HP OfficeJet 250 All-in-One (print, copy, scan)
- ▶ Canon Pixma iP110v
- ▶ Buy on line NOW and have shipped to home of staff in need



Multifunction versus separate scanner & printer
For immediate home/remote use consider size of home office area



v.



Less money versus longer life & better performance

Portable Postage & Label Printer

DYMO Label Printer & Digital Scale - \$218

DYMO 450 Twin Turbo (no scale) - \$135



Portable Optical Drive/DVD

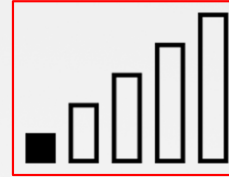
- ▶ **Smaller & lighter = no drive**
- ▶ **External USB DVD player/recorder external drive = \$30**



MOBILE COMMUNICATIONS



▶ Cell phones aren't the best option



▶ **Hosted** Voice Over Internet Protocol (**VoIP**) is a GREAT option

Laptop



+

Plantronics
Savi Office W730



You Must Have A Web Meeting Service


▶ GoToMeeting

GoToMeeting®

▶ WebEx MeetMeNow

webex
meetmenow

▶ Adobe Connect

 Adobe Connect

▶ Microsoft Teams

 Microsoft Teams

▶ Join.Me

join
me

▶ Zoom

zoom

<https://www.affinityconsulting.com/comparewebmeetings/>

Better Webcams & Portable Video Conferencing

- ▶ **Better Webcams** (super high demand right now so prices are high)
 - ▶ **Logitech C920 HD** – list price \$80
 - ▶ **Logitech C930e** – list price \$130
 - ▶ **Logitech Brio Ultra Pro** – list price \$199



- ▶ **Complete portable video conferencing system – Logitech Group Video Conference bundle – list \$1,300**

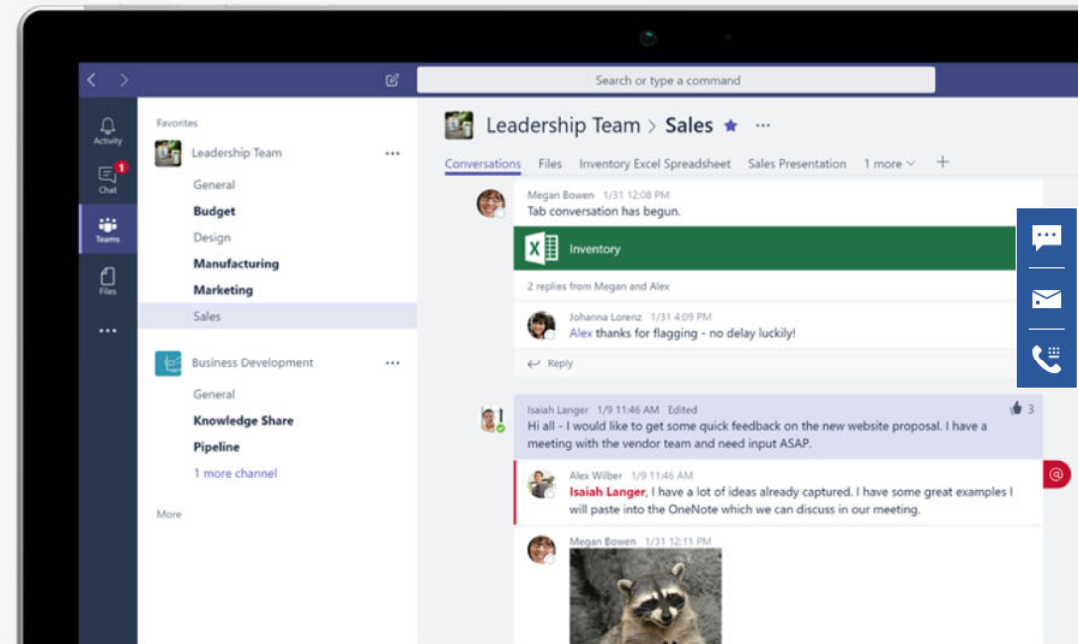


Instant Messaging Can Be Very Important

Instant messaging with Microsoft Teams

Sign in

Sign up for free



Keep the team connected no matter where work takes you with Microsoft Teams

Professional Answering Service

To find options, web search the phrase **virtual receptionist**
(For some small firms simpler approaches may be preferable for
COVID)



Virtual In/Out Boards

▶ www.simpleinout.com

Want to save time, organize employees, and always be in the know?



▶ www.virtualinout.com

An illustration on a teal background showing a team of people moving through a doorway. On the left, a woman in a white uniform and a man at a desk with a laptop are shown. In the center, a woman in a black dress is walking through a dark doorway. On the right, a man is pushing a hand truck. White arrows point from the desk area towards the doorway and then towards the hand truck, suggesting a flow or transition.

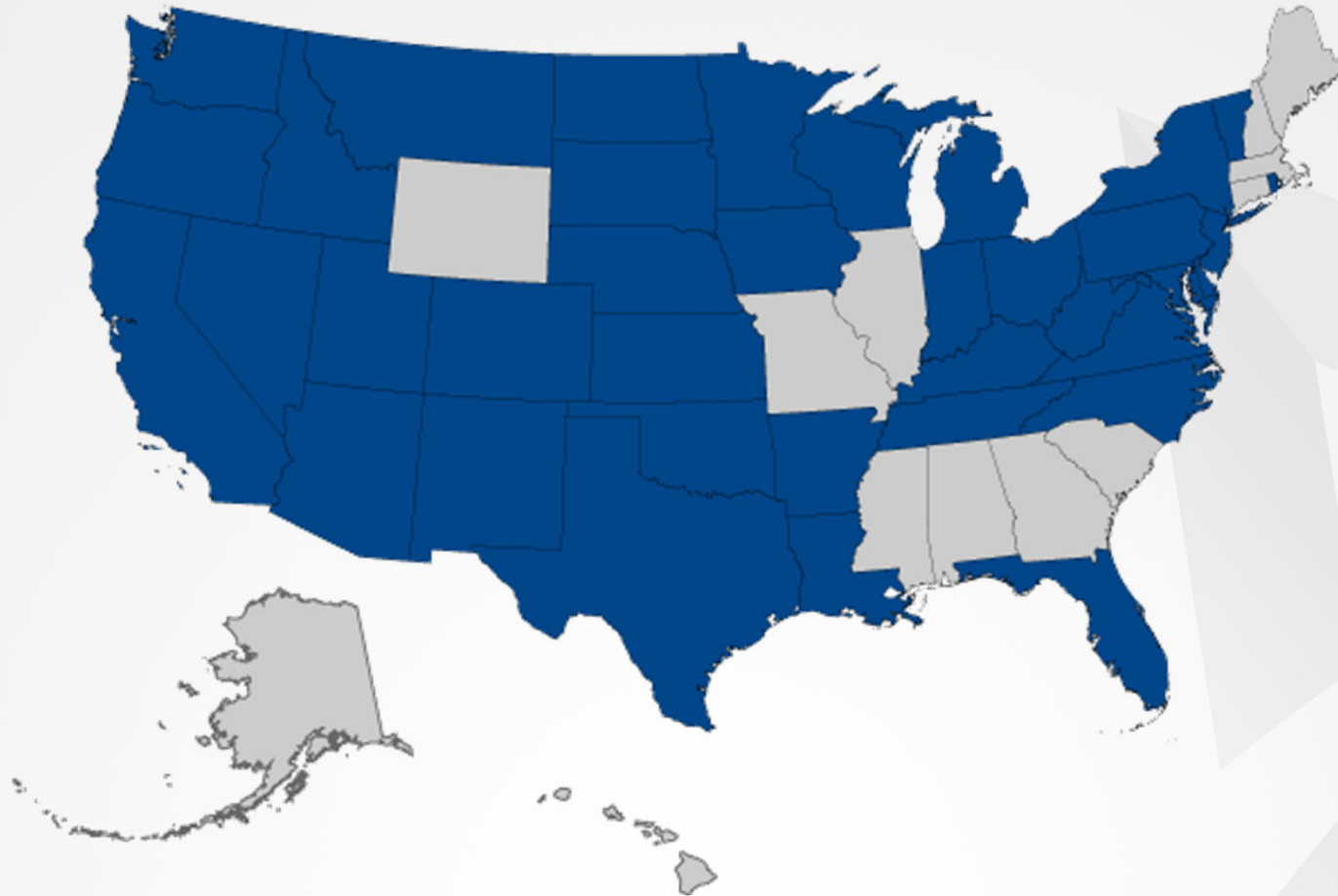
Team Movements Simplified!

Virtual In/Out provides your employees and visitors with a simple way to sign in and out of any location.

A red paper airplane is shown in flight, moving from the top left towards the center. Below it, a dashed grey line indicates its path. The background is a light grey surface covered with a grid of white paper airplanes. A red banner with white text is positioned in the upper right area.

GETTING DOCUMENTS SIGNED

Blue States Authorized eNotary and/or Online Notary



Digital Signatures Are Legal But Not Generally For Wills

- ▶ DocuSign: www.docusign.com
- ▶ RightSignature: (our favorite) www.rightsignature.com
- ▶ Even if you cannot use for wills consider for retainer agreements and other documents
- ▶ You can easily add this service NOW to your repertoire



The screenshot shows the RightSignature website interface. On the left, a laptop displays a document titled "RED PROPOSAL FORM" from "The California State University". The document text includes "The Board of the California State University, on behalf of the State of California, hereby offers to the proposed contractor to provide the services of the proposed contractor for the period of 12 months from the date of the award of the contract." Below the document, there is a "START MY FREE TRIAL" button. On the right, a sign-up form is visible with the following fields: "Country" (set to Canada), "First Name", "Last Name", and "Email". Below the form, there is a checkbox for "Yes, I'd like to hear about offers and services from Citrix by email." with "Yes" selected. At the bottom of the form, it says "By submitting this form you agree to the ShareFile Terms of Service and Privacy Policy." and a "Start My Free Trial" button.

Digital Signatures

▶ **eSign:** www.adobe.com/esign

▶ **OneSpan:** www.esignlive.com

▶ **Hellosign:** www.hellosign.com



Adobe Document Cloud /

eSign services



OneSpan

Be bold. Be secure.



HELLOSIGN

A red paper airplane is shown in flight, moving from the top left towards the center. A dashed grey line follows its path, curving downwards. Below the path, a grid of white paper airplanes is arranged in rows, representing a field or a pattern. The background is a light grey surface.

SECURITY & PROTECTING CLIENT DATA

OK Rule 1.6(c) + Comments 16 & 17

(c) A lawyer shall make **reasonable efforts** to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client.

[16] Paragraph (c) **requires a lawyer to act competently to safeguard information** relating to the representation of a client against unauthorized access by third parties and against inadvertent or unauthorized disclosure by the lawyer ...

[17] When **transmitting a communication** that includes information relating to the representation of a client, **the lawyer must take reasonable precautions** to prevent the information from coming into the hands of unintended recipients. ...

Your Security Portfolio

▶ Laptop, tablet & phone encryption

▶ Windows 10 Pro – Bitlocker

▶ Mac – FileVault



▶ Email encryption – for example rmail.com  RMail

▶ Home router encryption – WPA2 or WPA3 (not ok to use WEP) & change your default admin password

▶ VPN service – for example NordVPN



You Need A Password Manager

- ▶ Part of **your estate plan** – makes it sharable
- ▶ **Way too many** passwords and logons to keep track of
- ▶ They generate **strong passwords**
- ▶ **You're using the same password** for many logons
- ▶ Holds credit cards
- ▶ Holds any kind of personal info

Options

- ▶ Dashlane
- ▶ LastPass
- ▶ Sticky Password
- ▶ LogMeOnce
- ▶ 1Password
- ▶ TrueKey
- ▶ RoboForm
- ▶ Keeper Desktop



Encrypted Flash Drives – If you are Saving to Your Home Laptop not the Cloud

▶ **Kingston DataTraveler 4000**



▶ **Aegis Secure Key**



▶ **CMS Secure Vault FIPS**



Encrypted External Drives

- ▶ **Lenovo ThinkPad USB 3.0 Secure Hard Drive**



- ▶ **Aegis Padlock**



- ▶ **iStorage 3 TB encrypted hard drive**



Enable Two Factor Authentication (2FA)

Requires **2 authentication factors** to verify identity

- ▶ **Knowledge** factors – something you know
- ▶ **Possession** factors – ID card, security token or smartphone
- ▶ **Inherence** factors - biometrics

Required Policies

- ▶ **Internet use**
- ▶ **Social media**
- ▶ **Document retention**
- ▶ **Secure password** – 12 characters, mixed case, at least 1 number & 1 symbol
- ▶ **Disaster recovery plan**
- ▶ **Mobile security**

If Using Home Devices

- ▶ **Make sure antivirus up to date**
- ▶ **Operating system updates have been installed**
- ▶ **Other family members should not have access**
- ▶ **Make sure WiFi is secure**

Mobile Backup For Your Laptop

▶ Carbonite



▶ iBackup



▶ CrashPlan



▶ SOS Online Backup



▶ iDrive



▶ BackBlaze



A conceptual illustration of cloud systems. A red paper airplane is shown in flight, leaving a dashed grey trail. Below it, a field of white paper airplanes is arranged in a grid. A red banner with the text "CLOUD SYSTEMS" is positioned in the upper right.

CLOUD SYSTEMS

If You've Resisted, It's Time To Embrace The Cloud

Software as a Service (**SaaS**)

CosmoLex[®]
By Tabs3

netdocuments[®]

Infrastructure as a Service (**IaaS**)
aka “hosted servers”

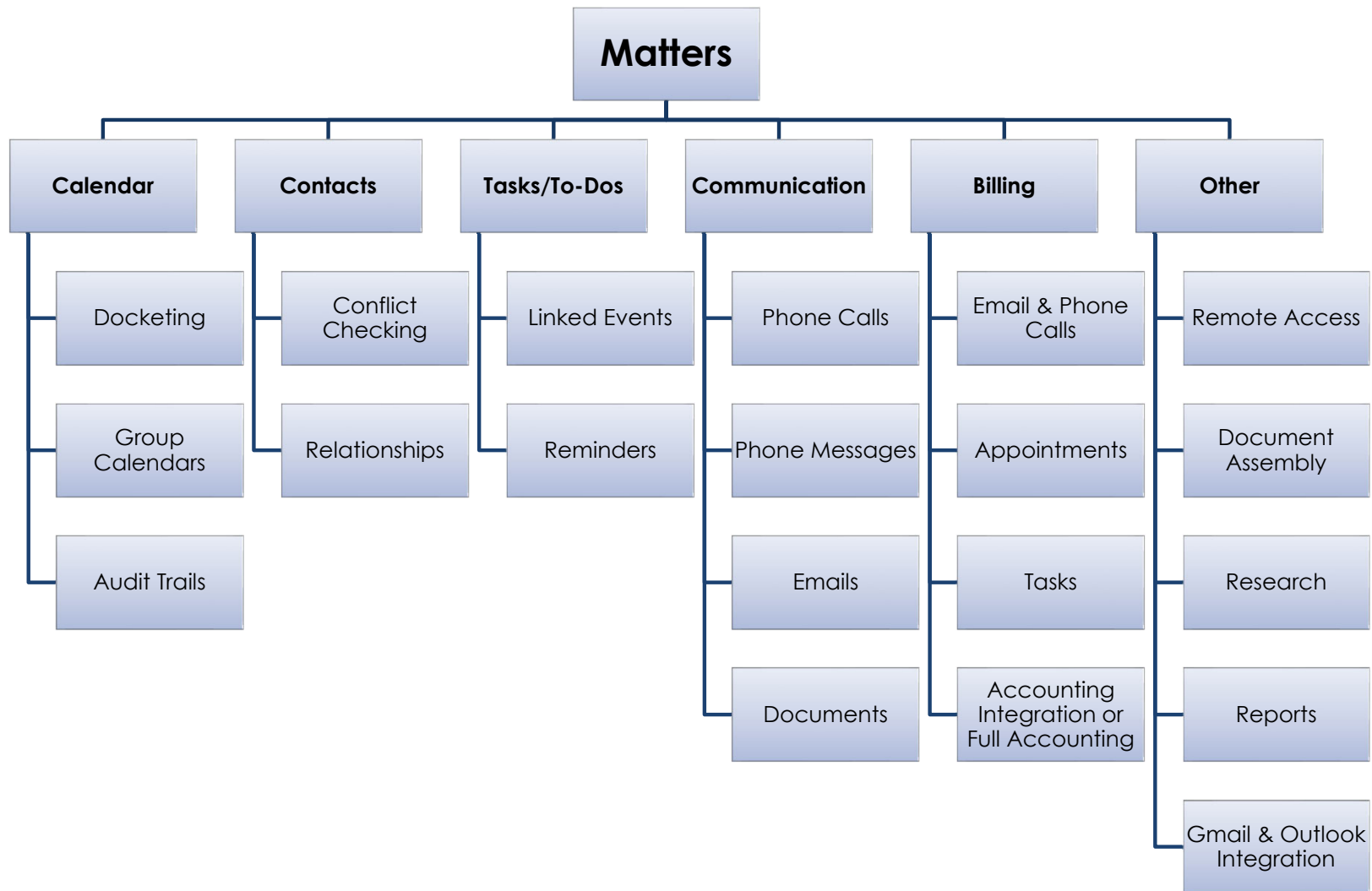
PROCIRRUS[™]
cloud technologies

Cloud Examples

- ▶ **Email**
- ▶ **Dropbox/Box/OneDrive/Google Drive**
- ▶ **ShareFile**
- ▶ **QuickBooks Online or Xero**
- ▶ **Web-based case management**
- ▶ **Web-based accounting**
- ▶ **Office 365 or G Suite**
- ▶ **Carbonite or Mozy online backup**
- ▶ **Hosted servers**
- ▶ **Electronic case filing**

Consider Cloud Case Management & Accounting





Protect Your Firm – Do This NOW!

If a **lawyer leaves**, can you...

- ▶ Produce his/her case list?
- ▶ Re-create a case history?
- ▶ Find all email related to a case?
- ▶ Find all documents related to a case?
- ▶ Determine status of a case?
- ▶ Consider what pay cuts, disruption of COVID, loss of clients, etc. may do to staff

If not, you have a problem

Protect Your Firm

If **something happens to you**, can others...

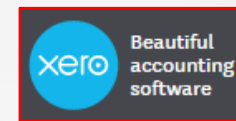
- ▶ Produce your case list?
- ▶ Re-create a case history?
- ▶ Find all email related to a case?
- ▶ Find all documents related to a case?
- ▶ Determine status of a case?
- ▶ COVID makes these hypotheticals REAL

If not, you have a problem

Cloud Accounting Only Options

- ▶ QuickBooks Online
- ▶ Xero
- ▶ Bill4Time
- ▶ Legal Billing
- ▶ Toggl
- ▶ FreshBooks
- ▶ Timesolv Legal
- ▶ Case management options

Intuit QuickBooks Online






























BILL4TIME
Web-Based Time Billing Software

Legal Billing from Chaos Software



 TimeSolv Legal

If You Have Office 365, Then Use More Of It

 Bookings Online appointment scheduling fo...	 Calendar Schedule and share meeting and e...	 Delve Get personal insights and relevant...	 Dynamics 365 Break down the silos between you...	 Excel Discover and connect to data, mo...
 Forms Create surveys, quizzes, and polls ...	 Kaizala A simple and secure mobile chat a...	 MyAnalytics Create better work habits with insi...	 OneDrive Store, access, and share your files i...	 OneNote Capture and organize your notes a...
 Outlook Business-class email through a ric...	 People Organize your contact info for all ...	 Planner Create plans, organize and assign ...	 Power Apps Build mobile and web apps with th...	 Power Automate Create workflows between your ap...
 Power BI Create actionable, dynamic, and e...	 PowerPoint Design professional presentations.	 SharePoint Share and manage content, knowl...	 Stream Share videos of classes, meetings, ...	 Sway Create and share interactive repor...
 Tasks Create and manage tasks in Outlo...	 Teams The customizable, chat-based tea...	 To Do Manage, prioritize, and complete t...	 Video Share videos of classes, meetings, ...	 Whiteboard Ideate and collaborate on a freeo...
 Word Bring out your best writing.	 Yammer Connect with coworkers and class...			

A red paper airplane is shown in flight, moving from the top left towards the center. A dashed grey line follows its path, curving downwards. Below the path, a grid of white paper airplanes is arranged in rows, suggesting a pattern or a sequence of documents. A red banner with white text is positioned in the upper right area.

DRAFTING DOCUMENTS

Templates Are Critical

[MUTUAL] CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

Opening Commentary: If the agreement is one way, then we define the Discloser and Recipient in the opening paragraph. If the agreement is mutual, then we do not need to define or abbreviate our party names, because they will only be specified four times – in the opening, in the notice section, in the signature, and in the joinder.

This [mutual] confidentiality and non-disclosure agreement is dated [Month Day, Year,] and is between [_____, identify type of entity] [Delete if Mutual (“Discloser”)], and [_____, identify type of entity] [Delete if Mutual (“Recipient”)].

Background Commentary: The idea here is that if we have a mutual agreement, we are going to establish a setup where either party could be a discloser or a recipient depending on who discloses the information and who receives the information. If it is a one way agreement then we define discloser and recipient in the opening.

The parties wish to explore a business opportunity of mutual interest involving [describe what is going on: sale of business, product development, consulting arrangement, joint venture, etc.] (“Business Opportunity”). [USE THIS LANGUAGE FOR A ONE-WAY AGREEMENT: In connection with the Business Opportunity, Discloser may disclose to Recipient, and Recipient may have access to, certain information that Discloser desires Recipient to treat as confidential. Recipient agrees to the terms herein in order to induce Discloser to disclose the information.] [USE THIS LANGUAGE FOR A MUTUAL AGREEMENT: In connection with the Business Opportunity, each party may disclose to the other, and each party may have access to, certain information that the party disclosing (“Discloser”) desires the receiving party (“Recipient”) to treat as confidential. Each of the parties may be considered a Discloser in one instance and a Recipient in another instance, based upon which party is provided or obtaining information. The parties are entering into this agreement in order to induce one another to disclose confidential information to enable them to explore the Business Opportunity.]

Word Processor Automation

CONFIDENTIAL RETIREMENT AGREEMENT AND GENERAL RELEASE

This confidential retirement agreement and general release is between the University of Higher Education and

transition
retirement
resignation
separation

University and Mr. [REDACTED] to conclude their employer-employee relationship in an amicable manner and agree as follows:

1. Retirement date. Mr. [REDACTED] voluntarily retires from his position as [REDACTED] effective ("retirement date"). Mr. [REDACTED] shall continue to perform his duties as a faculty member in good faith until [REDACTED]. After his retirement date, neither party has any obligation to the other, except as described below.

2. Payment in exchange for promises. University shall provide the following compensation and benefits to Mr. [REDACTED] (all of which may not otherwise be due to him) in exchange for his promises and subject to the conditions in this agreement.

3. No other payments due. Mr. [REDACTED] confirms that no other payments are due and owing to him.

Document Assembly Software Could Save The Day

- ▶ Works with Microsoft Word
- ▶ You use **your** documents
- ▶ Answer questions
- ▶ Software does the heavy lifting

Document Assembly Software Options

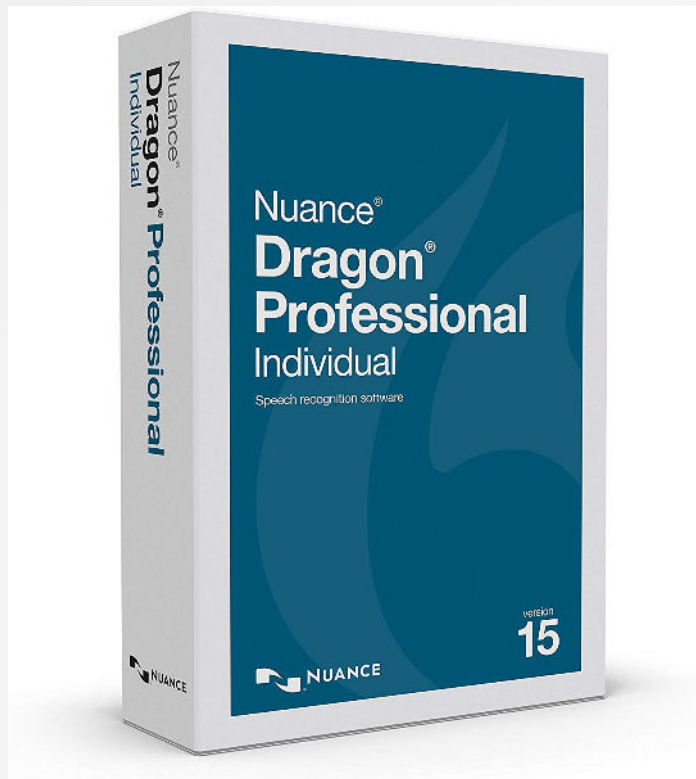
Players:

- ▶ **HotDocs** - www.hotdocs.com
- ▶ **Contract Express** - www.contractexpress.com
- ▶ **XpressDox** – www.xpressdox.com
- ▶ **TheFormTool** – www.theformtool.com
- ▶ **Rapidocs** - www.rapidocs.com
- ▶ **Pathagoras** - www.pathagoras.com
- ▶ **ActiveDocs** - www.activedocs.com
- ▶ **Smokeball** – www.smokeball.com



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Andrea 351924 Speech Recognition Mic





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For workgroups or enterprise

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<http://tinyurl.com/jyculq6>

A red paper airplane is shown in flight, moving from the top left towards the center. Below it, a dashed grey line indicates its path. The background is a light grey surface covered with a grid of white paper airplanes. A red banner is positioned in the upper right quadrant, containing the text "HOME WORKSPACE" in white, bold, uppercase letters.

HOME WORKSPACE

Short List

- ▶ **Paper & electronic files must be secure**
- ▶ **It's worth getting another docking station, monitors, keyboard & mouse for home**
- ▶ **If you're used to dual/triple monitors at the office, you'll need them for home [but some of us do NOT like multiple monitor when using gotomypc, etc. to remote into an office desktop]**
- ▶ **Might be time to upgrade your internet access at home**

Conclusion and Additional Information

**Improve your Remote
Work Capabilities Now**

Conclusion

- Every practitioner can take steps to enhance remote work capabilities in the current COVID environment.
- Find out what works for your and your firm, what can be done now while you are facing challenges, what can be done when your office/firm gets limited ability to reopen, and what should be done long term.

Additional information

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