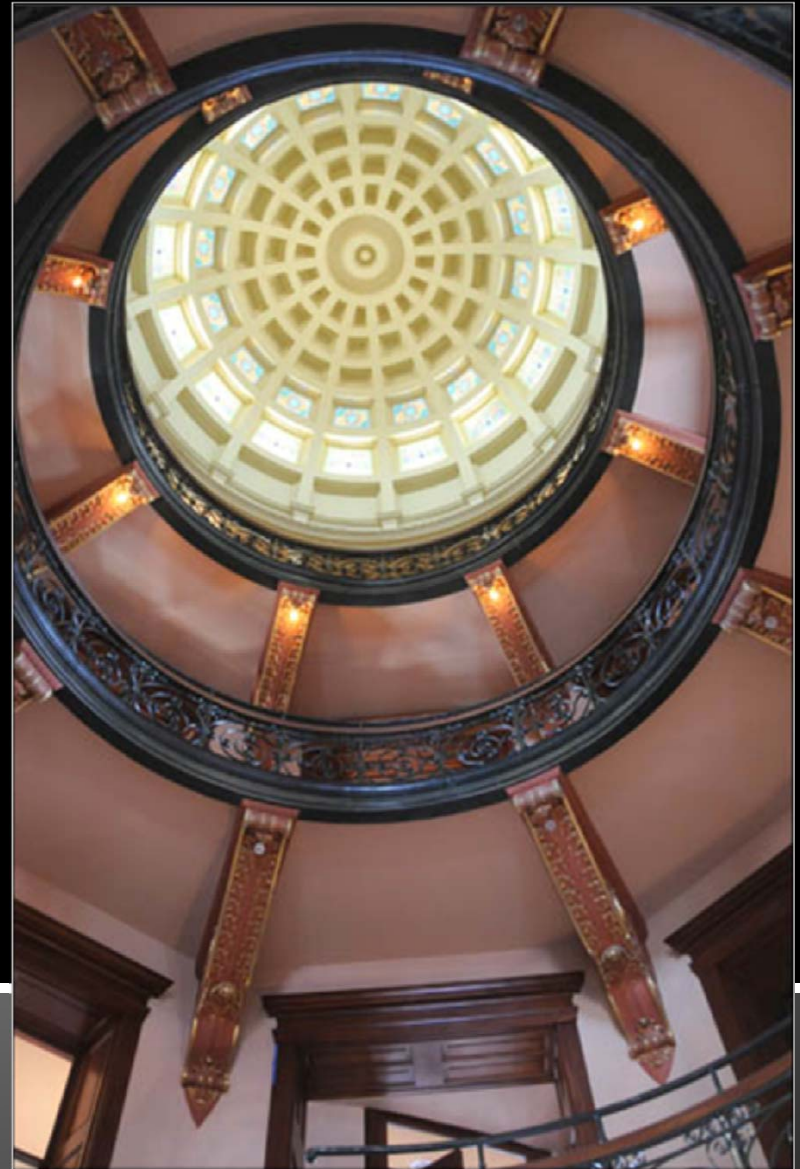


NTAP APRIL MEMBERSHIP
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Creating a Paper-Less Law Office

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The 1901 Harrison County Courthouse (restored 2009)
Marshall, Texas
J. Riely Gordon, architect

What is Paper-less?



What is Paper-Less?

- Not “Paperless”
- Paper-less”
- Objective is to improve on traditional paper when possible.
- Objective is not to eliminate all paper.
- WHY NOT?
 - Too hard to sell internally; and
 - Paper has its uses

How Are Electronic Files Better?

- Use less storage when active
- Easier retrieval
- More flexible retrieval
- Word searchable
- Easier retiring files

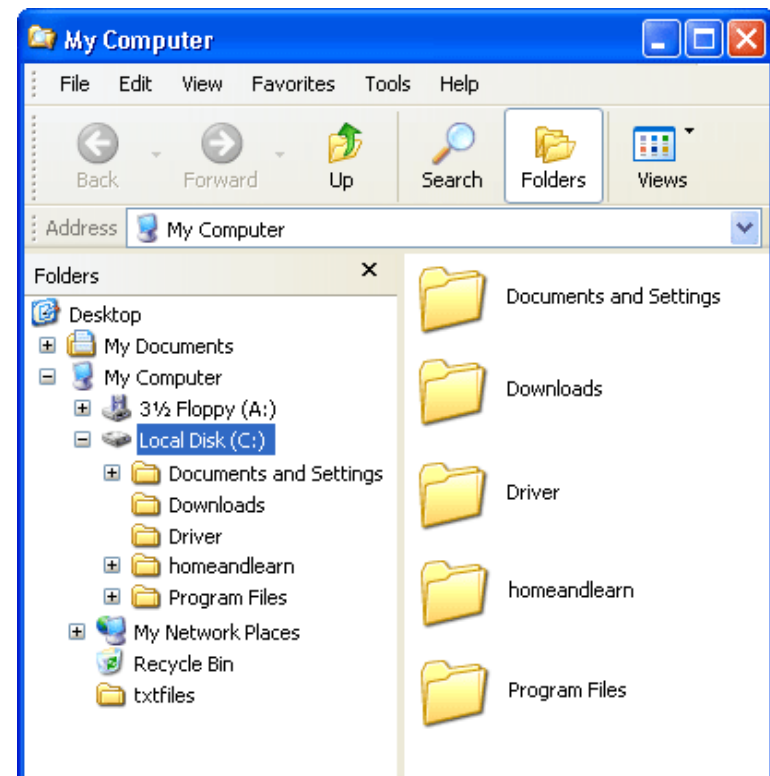
How Are Electronic Files Worse?

- Some have difficulty searching
- If not properly located/indexed, hard to find
- Can be harder to locate than selected paper in courtroom
- Harder to use than paper in courtroom
 - Cannot wave around
 - Cannot hand up for signature
- Reviewing on paper helps some learn
- Process of selecting papers helps some learn.

Structure: The Starting Point

Structure – the starting point

- Law Office/Document Management Software
- Programs (Evernote)
- ***Windows Folders***
 - Nested structure
 - Intuitive
 - Sortable (by date/doc #)
 - Searchable
 - Drag and drop



Location

- Computer
- Server – networked
 - Requires IT support
 - Requires security & routine backups
- ***Cloud***
 - Dropbox
 - Google Drive
 - Box
 - (Law Office/Document Management Software)

Cloud - advantages

- Available anywhere, on any device w/o IT expertise or help needed (usually)
- Easy to share large documents (place in separate folder and send link)
- Easy to restrict access selectively
- Ridiculously cheap for almost unlimited space
- Eliminates most risk of loss / backup concerns
 - Although you should back up periodically anyway

All at One or Gradual

- Most commentators suggest starting with your next file – don't try to scan existing files.
- Create the *structure* and the *scan plan* and start with newest cases.

Scanning

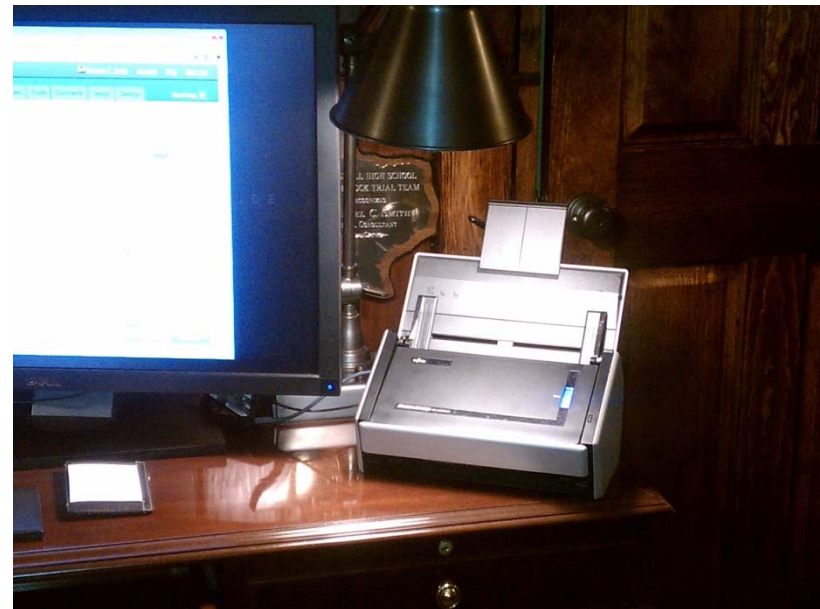


Scanning – need a plan

- Need a scanning plan for:
 - What is scanned (everything or certain things)
 - By whom (receptionist, paralegal, etc.)
 - When (when received/~~after reviewed~~)
 - How (file room, desktop, phone camera?)
 - Where saved (folder in directory)
 - What named (think of how will sort)
 - 2014 04 16 – Bradshaw – MCS to client **OR** call notes
 - 014 – Response to motion for summary judgment

Scanning – need devices

- High volume scanner officewide is fine *BUT*
- Desktop units are often the key to capturing all paper under the scan plan
- Fujitsu ScanSnap
 - High speed
 - Double sided
 - Easy interface



Scanning – need devices

- Fujitsu ScanSnap – scans to:
 - Desktop (as a pdf)
 - Specified folders (as a pdf)
 - Evernote (as pdf item)
 - Desktop (as a jpg)
 - Print
 - E-mail
 - And many, many more ...

Sample Scan Plan

- All pleadings, correspondence and discovery (paper or electronic) are saved into directories before review.
- Paper copy need not be destroyed, but it is no longer the office “original” – becomes a convenience copy for –
 - Attorney review
 - Working/hearing/trial notebook

Sample Scan Plan

- All notes are scanned, saved and destroyed after hearings/trials .
- CDs of production are saved and destroyed.
 - Document production can be segregated to make destruction after case is over easier / save archival storage space.
 - Confidential documents can be segregated.
- There is no home for paper in the case file.

Sample Scan Plan – non-case

- CLE materials are now electronic – don't get the notebooks – or at least just save the electronic copy.
- Research materials can be kept in a database

**What If Your
Lawyer Looks
Like This?**



Paper-Less is a Sliding Scale

- How much paper is enough varies from person to person and changes over time
- Federal court e-filing lessons:
 - Told the judges to ignore the electronic nature when they implemented it.
 - Some judges kept signing paper orders (which were quietly trashed after the e-versions were uploaded)
 - Some work off paper, and if so, the lawyers provide it.

Pointers

- Use paper case notebooks with copies of documents from files as needed (elimination of exhibits can make far smaller than traditional pleadings notebooks)
- Provide notebooks with paper documents to be reviewed (originals already scanned)

Pointers

- Print documents double-sided and using draft mode to make notebooks smaller & save ink.
- Provide desk references with useful documents/ references:
 - Research directories
 - Case documents & pleadings indexes

Emails

- Save files (Outlook) or print to pdf (Google Apps).
- May choose to save selectively.

Faxes

- Use email-based fax services (eFax).

Programs

- Outlook (Microsoft Office)
 - Task/Calendar/Contacts/E-mails
- OneNote (Microsoft Office)
- Evernote (note taking)
 - Legal research database
 - Case documents (notebook equivalent)
 - Notes/tasks
- iPad apps
 - iAnnotate

The End

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