

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

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**A KEY ESTATE PLANNING GUIDE**

ChronicIllnessPlanning.org

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

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

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**Thank you to our sponsors**

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Jane Ransom, Executive Director  
[ransom@americanbrainfoundation.org](mailto:ransom@americanbrainfoundation.org)  
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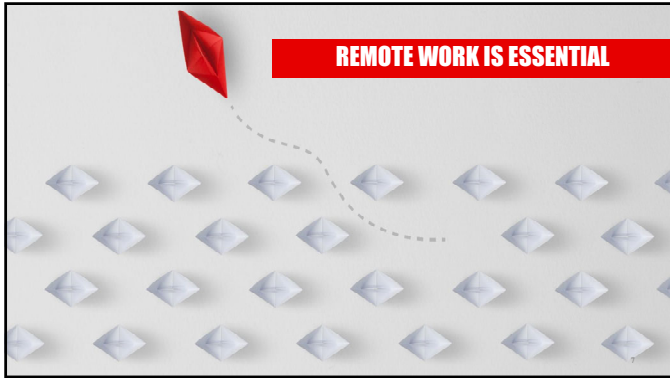
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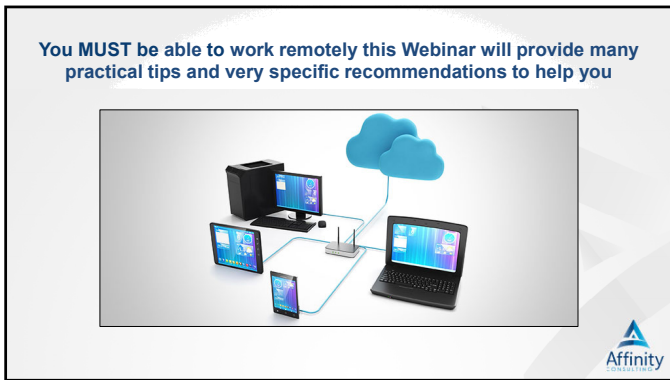
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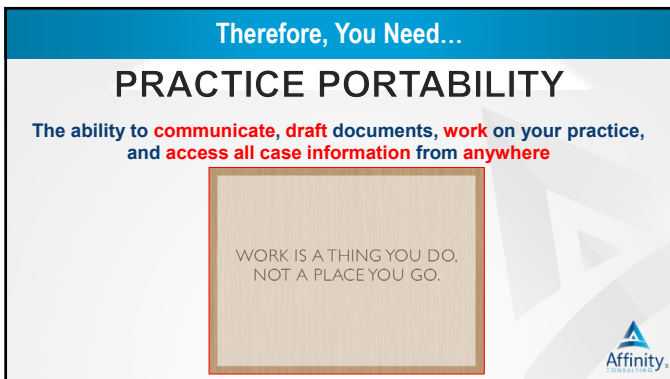
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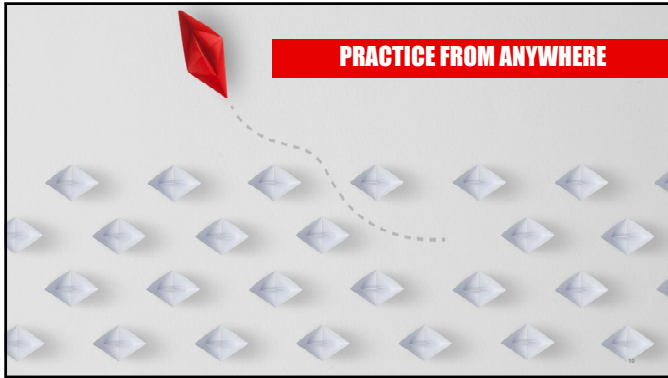
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**Untethered Practice**

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





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**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.





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**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.



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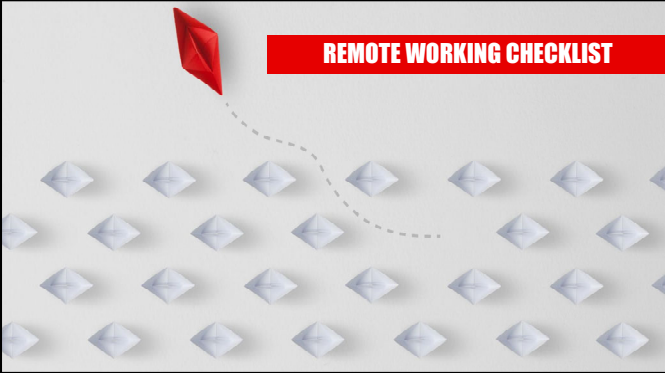
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**REMOTE WORKING CHECKLIST**



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**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



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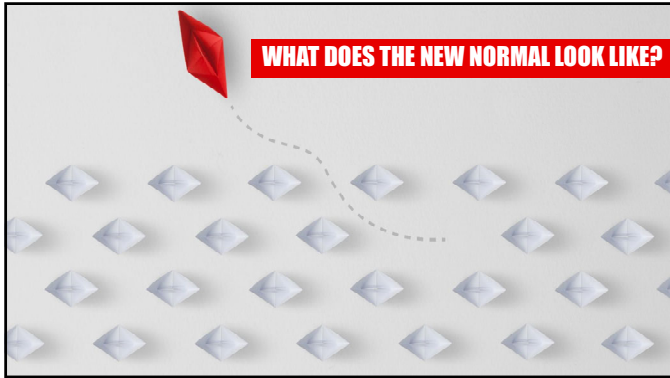
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**A Couple of Predictions**

- ▶ **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.



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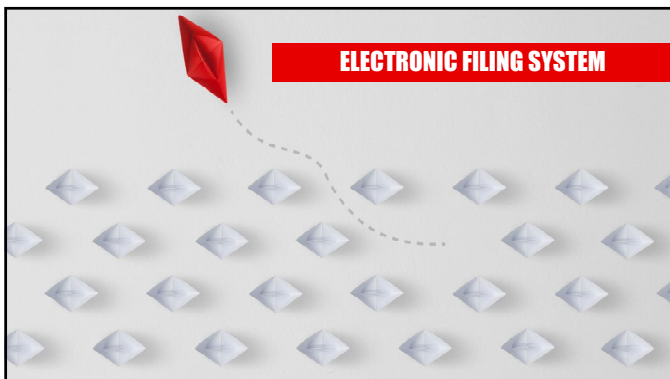
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### What's Realistic?

**Eliminate all paper?**  
Probably not

**Reduce paper?**  
Absolutely

**But what do you do NOW??**



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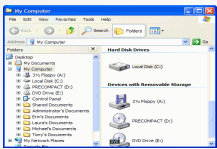

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### Solution

▶ 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**

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### 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**



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### 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**

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### 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 **May 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



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## STEP 1:

# Bullet-Proof Backup & Security

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### 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



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

- ▶ Carbonite Personal Plus **CARBONITE**  
\$72/PC/yr – unlimited storage
- ▶ WD 3TB My Book Desktop External Hard Drive - \$89
- ▶ Acronis True Image 2020 - \$35 – creates a mirror image of entire hard drive



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### STEP 2: The Hardware



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### 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

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### 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



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### Recommended Flatbed Scanners

- ▶ **Xerox Duplex Combo Flatbed Scanner**  
(25/50 ppm – \$224)
- ▶ **Fujitsu fi-7280** (80/160 ppm – \$1,835)






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### 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)



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### 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)



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

- ▶ **Fujitsu ScanSnap S1300i**  
(8/16 ppm - \$248)
- ▶ **Fujitsu ScanSnap iX100**  
(really slow - \$190)



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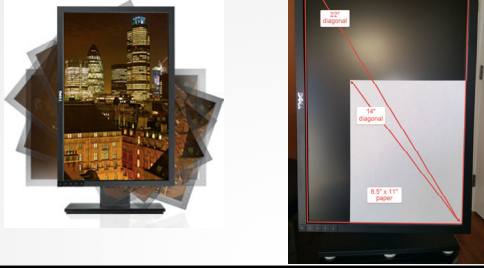
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### Buy Monitors That Rotate

Easily read documents on screen



The image shows a monitor on a stand. On the left, the monitor is rotated 90 degrees counter-clockwise, displaying a cityscape at night. On the right, the monitor is rotated 90 degrees clockwise, displaying a document with a red box around it. The document has labels: "12" monitor" at the top, "14" diagonal" in the middle, and "8.5"x11" paper" at the bottom. The Affinity logo is in the bottom right corner.

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

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



The image shows three different types of VESA monitor stands. On the left is a simple black stand with a flat base. In the middle is a similar stand with a slightly different base. On the right is a more complex, adjustable stand with a long arm and a circular base. A small circular inset shows a close-up of a VESA mounting bracket being attached to a monitor.

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### Dual Monitors Highly Recommended

\$1,000 + for a single 49" monitor ~~x~~  
\$280 - \$300 for dual 27" monitors ~~x~~



The image shows a curved monitor on a stand. The screen displays a sunset over a body of water with mountains in the background. The brand name "SCEPTRE" is visible at the bottom of the screen. The Affinity logo is in the bottom right corner.

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**Mobile Computer or Tablet**

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



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**STEP 3:**

**Searchable PDFs**



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**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



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**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**



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**If You Have Thousands of PDFs To OCR**

- ▶ DocsCorp contentCrawler
- ▶ Trumpet Symphony OCR





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**STEP 4:**

**Search Program  
or  
Document Management System**



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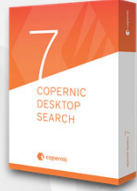


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### Windows Search Software

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

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### Mac Search Software

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




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### Players

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

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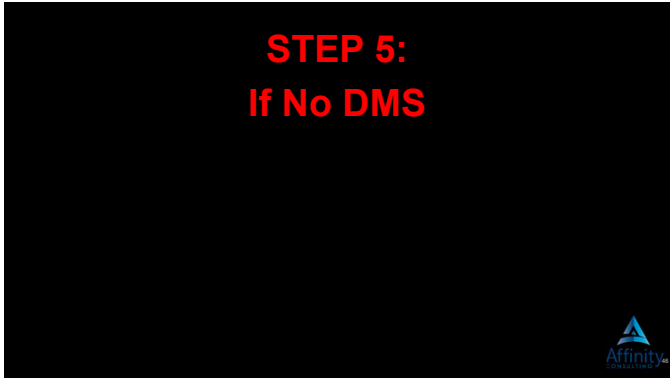
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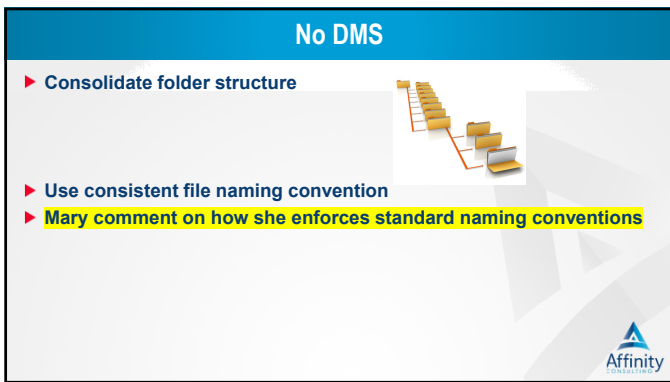
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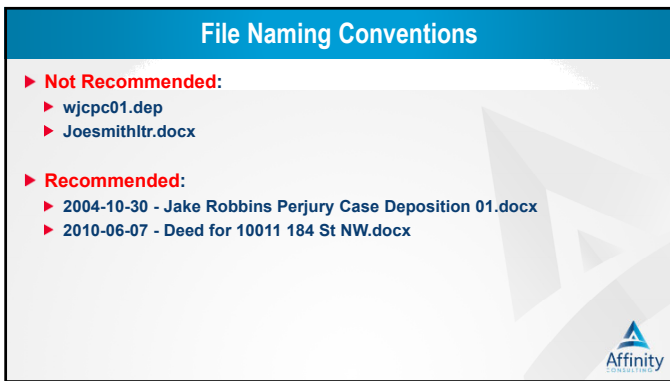
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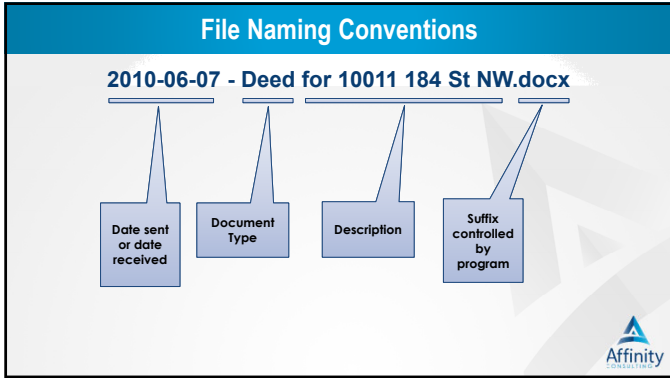
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### Electronic Filing System

**Must hold:**

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

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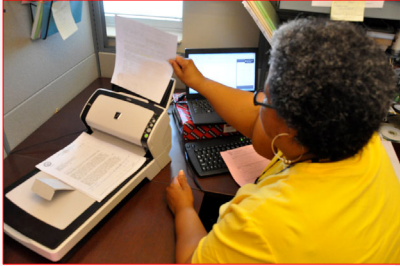
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Make your **active file digital**  
(don't wait until COVID is over to start scanning)



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### 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](http://www.ringcentral.com)
  - ▶ [www.myfax.com](http://www.myfax.com)
  - ▶ [www.efax.com](http://www.efax.com)
  - ▶ [www.greenfax.com](http://www.greenfax.com)
  - ▶ [www.onebox.com](http://www.onebox.com)
  - ▶ [www.faxzero.com](http://www.faxzero.com)
- ▶ Don't scan *everything*
- ▶ Distribute mail and let users scan



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### STEP 7: Email Stored Outside Email Program



How to save an email to PDF

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**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



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- ▶ If you use  **Outlook**

- ▶ Then you need one of these **because they integrate**
  - ▶ Adobe Acrobat
  - ▶ Nuance Power PDF Advanced
  - ▶ Foxit PhantomPDF Business
  - ▶ Nitro Pro



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**STEP 8:**  
**Collaborative Tools**



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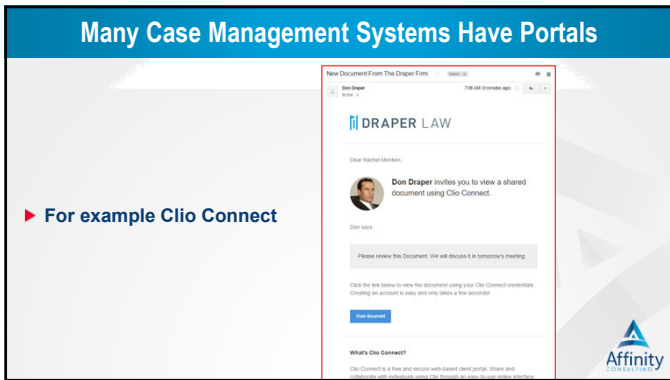
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**Training**

- ▶ 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



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**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



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

**RELY ON IT!**



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### 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.



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### 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.



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### ACCESSING FILES REMOTELY



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**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  

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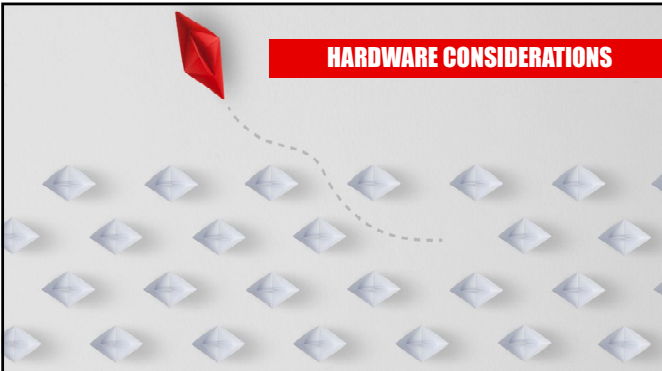
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**HARDWARE CONSIDERATIONS**



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**Two Basic Options**

- ▶ PC you can take with you 
- ▶ Home PC used to remotely access office systems  
(these must be secure from family members)



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### 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



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### 2-in-1 Convertible

Hybrid tablet/laptop



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### Tablet



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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




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### 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.

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### 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.



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### 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 – 8<sup>th</sup>, 9<sup>th</sup>, or 10<sup>th</sup> gen



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### Deciphering Intel Processors

- ▶ i3 – i5 – i7 – i9: speed/power increments
- ▶ **Generation: current is 10<sup>th</sup> – how to tell**
  - ▶ Intel Core i7-10710U – 10<sup>th</sup> gen
  - ▶ Intel Core i7-9750H – 9<sup>th</sup> 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>



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### 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 use and sampling conditions.



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### Best Travel Mice

- ▶ Logitech MX Master - \$60
- ▶ Logitech Anywhere Mouse MX - \$35



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### 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



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



v.

**Less money versus longer life & better performance**



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### Portable Postage & Label Printer

DYMO Label Printer & Digital Scale - \$218  
DYMO 450 Twin Turbo (no scale) - \$135



The image shows two DYMO products. On the left is the DYMO Label Printer & Digital Scale, a black device with a digital display and a printer. On the right is the DYMO 450 Twin Turbo, a smaller black printer with a roll of labels. A computer monitor in the background displays the DYMO Label v.5 software interface.

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### Portable Optical Drive/DVD

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



The image shows a black external USB DVD player/recorder. It has a USB Type-C port and a USB 3.0 port. Icons for USB 3.0, Type-C, DVD, and CD are shown above the device. The Affinity logo is in the bottom right corner.

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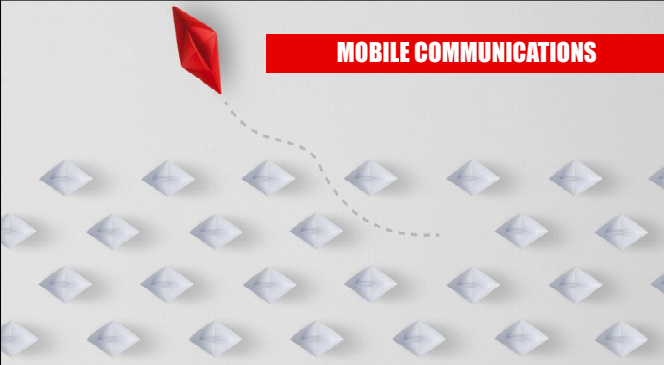
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### MOBILE COMMUNICATIONS



The graphic features a red envelope icon at the top left with a dashed line leading to a grid of blue envelopes below. The text 'MOBILE COMMUNICATIONS' is written in white on a red background at the top.

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▶ Cell phones aren't the best option 

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

Laptop + Plantronics Savi Office W730





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### You Must Have A Web Meeting Service

- ▶ GoToMeeting 
- ▶ WebEx MeetMeNow 
- ▶ Adobe Connect 
- ▶ Microsoft Teams 
- ▶ Join.Me 
- ▶ Zoom 

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



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### 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





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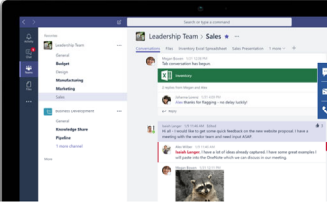
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### Instant Messaging Can Be Very Important

Instant messaging with Microsoft Teams

Sign in Sign up for free



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

Affinity CONSULTING

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### Professional Answering Service

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



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### Virtual In/Out Boards

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

▶ [www.simpleinout.com](http://www.simpleinout.com)



▶ [www.virtualinout.com](http://www.virtualinout.com)

**Team Movements Simplified!**  
 Virtual In/Out provides your employees and visitors with a simple way to sign in and out of your facilities.

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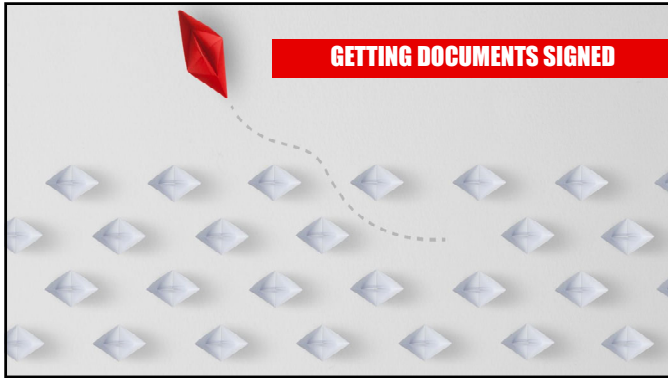
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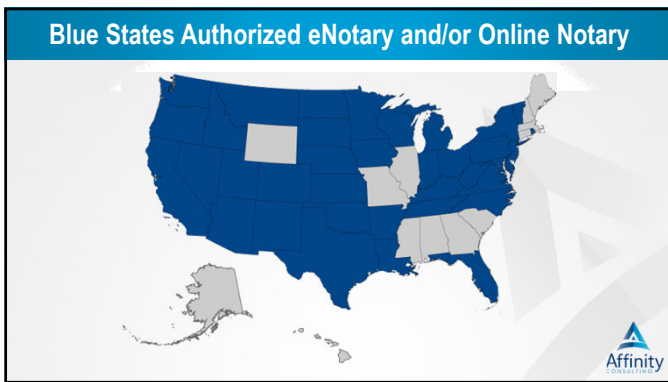
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**Digital Signatures Are Legal But Not Generally For Wills**

- ▶ DocuSign: [www.docusign.com](http://www.docusign.com)
- ▶ RightSignature: (our favorite) [www.rightsignature.com](http://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 easiest, fastest way to get e-signatures.

RightSignature

Affinity

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**Digital Signatures**

- ▶ eSign: [www.adobe.com/esign](http://www.adobe.com/esign)
- ▶ OneSpan: [www.esignlive.com](http://www.esignlive.com)
- ▶ Hellosign: [www.hellosign.com](http://www.hellosign.com)

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**SECURITY & PROTECTING CLIENT DATA**

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**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. ...

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### Your Security Portfolio

- ▶ **Laptop, tablet & phone encryption**
  - ▶ Windows 10 Pro – Bitlocker
  - ▶ Mac – FileVault
- ▶ **Email encryption** – for example rmail.com 
- ▶ **Home router encryption** – WPA2 or WPA3 (not ok to use WEP) & change your default admin password
- ▶ **VPN service** – for example NordVPN 



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### 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



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### Options

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



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

- ▶ Kingston DataTraveler 4000
- ▶ Aegis Secure Key
- ▶ CMS Secure Vault FIPS



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**Encrypted External Drives**

- ▶ Lenovo ThinkPad USB 3.0 Secure Hard Drive
- ▶ Aegis Padlock
- ▶ iStorage 3 TB encrypted hard drive



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**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



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**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**



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**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**



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**Mobile Backup For Your Laptop**

- ▶ **Carbonite** 
- ▶ **iBackup** 
- ▶ **CrashPlan** 
- ▶ **SOS Online Backup** 
- ▶ **iDrive** 
- ▶ **BackBlaze** 



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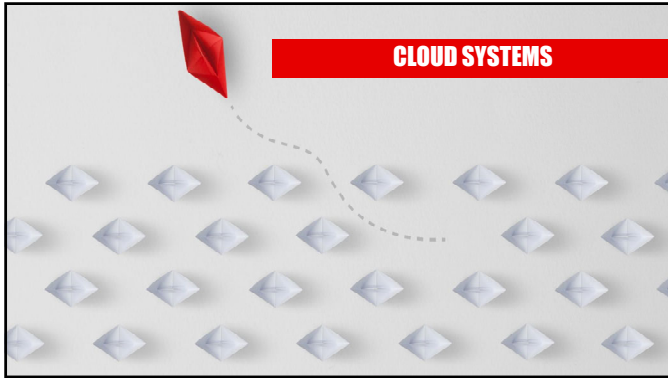
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**If You've Resisted, It's Time To Embrace The Cloud**

**Software as a Service (SaaS)**

CosmoLex<sup>®</sup>  
By Taber

netdocuments<sup>®</sup>

**Infrastructure as a Service (IaaS)  
aka "hosted servers"**

PROCIRRUS<sup>™</sup>  
cloud technologies

Affinity  
CONSULTING

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**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

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**Consider Cloud Case Management & Accounting**

actionstep  
CosmoLex  
Clio  
mycase  
PRACTICEPANTHER  
rocket matter  
CENTERBASE  
zolaSUITE  
Affinity

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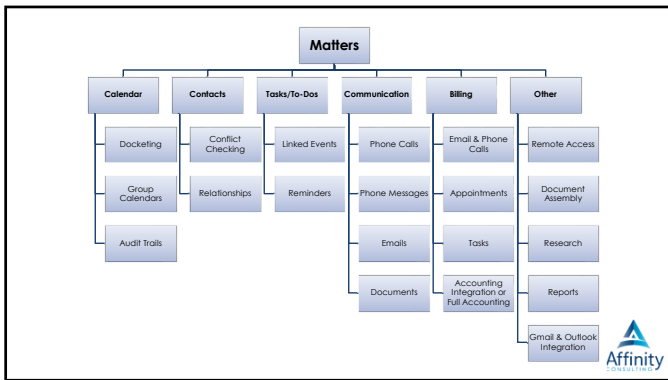
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**Protect Your Firm – Do This NOW!**

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

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### 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**



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### Cloud Accounting Only Options

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




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### If You Have Office 365, Then Use More Of It

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



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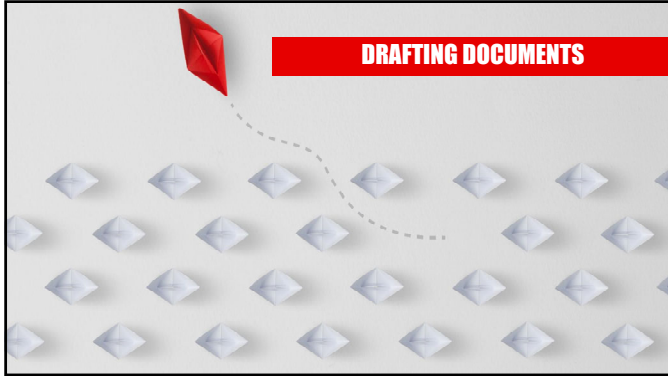
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### Templates Are Critical


**[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.]



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### Word Processor Automation


**CONFIDENTIAL RETIREMENT AGREEMENT AND GENERAL RELEASE**

This confidential retirement agreement and general release is between the University of Higher Education and [redacted] University and [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.



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### Document Assembly Software Could Save The Day

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



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### Document Assembly Software Options

Players:

- ▶ HotDocs - [www.hotdocs.com](http://www.hotdocs.com)
- ▶ Contract Express - [www.contractexpress.com](http://www.contractexpress.com)
- ▶ XpressDox – [www.xpressdox.com](http://www.xpressdox.com)
- ▶ TheFormTool – [www.theformtool.com](http://www.theformtool.com)
- ▶ Rapidocs - [www.rapidocs.com](http://www.rapidocs.com)
- ▶ Pathagoras - [www.pathagoras.com](http://www.pathagoras.com)
- ▶ ActiveDocs - [www.activedocs.com](http://www.activedocs.com)
- ▶ Smokeball – [www.smokeball.com](http://www.smokeball.com)




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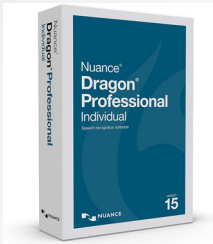
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### Amazing Speech Recognition

**Dragon Professional Individual v15**



**Andrea 351924 Speech Recognition Mic**





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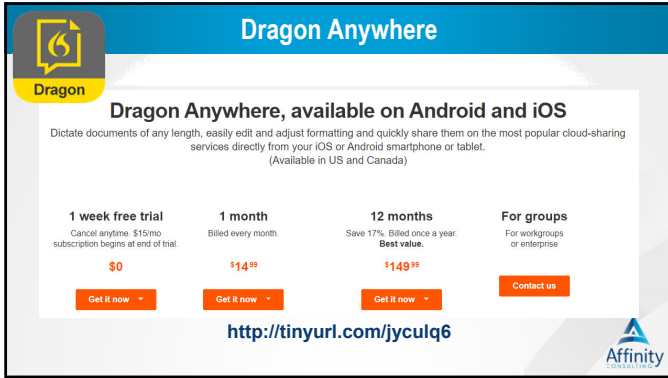
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**Dragon Anywhere**

Dragon

**Dragon Anywhere, available on Android and iOS**

Dictate documents of any length, easily edit and adjust formatting and quickly share them on the most popular cloud-sharing services directly from your iOS or Android smartphone or tablet.  
(Available in US and Canada)

<p><b>1 week free trial</b></p> <p>Cancel anytime. \$15/mo subscription begins at end of trial.</p> <p><b>\$0</b></p> <p>Get it now</p>	<p><b>1 month</b></p> <p>Billed every month.</p> <p><b>\$14.99</b></p> <p>Get it now</p>	<p><b>12 months</b></p> <p>Save 17%. Billed once a year. <b>Best value.</b></p> <p><b>\$149.99</b></p> <p>Get it now</p>	<p><b>For groups</b></p> <p>For workgroups or enterprise</p> <p>Contact us</p>
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<http://tinyurl.com/jyculq6>

Affinity

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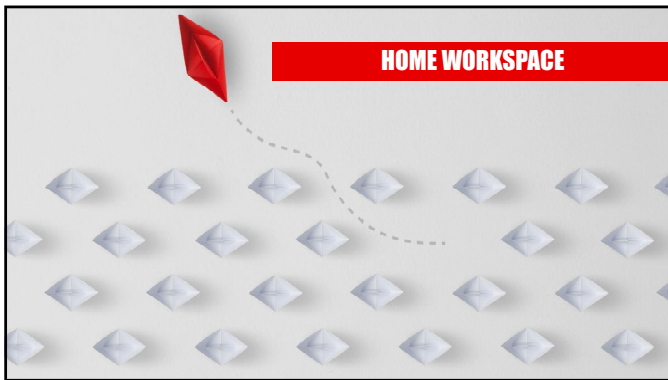
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**HOME WORKSPACE**

A red paper airplane icon is shown flying over a grid of white paper airplane icons on a light gray background.

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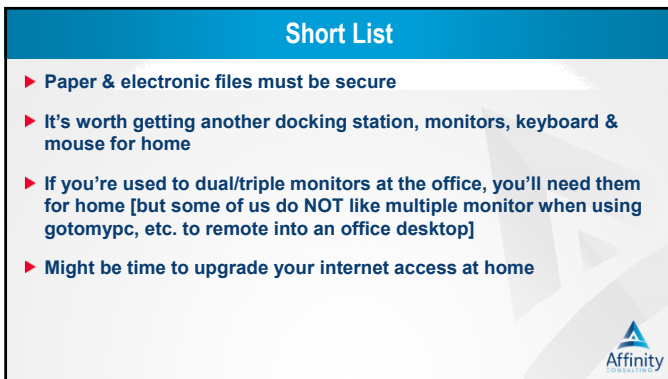
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**Short List**

- ▶ 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

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**Conclusion and  
Additional Information**

**Improve your Remote  
Work Capabilities Now**

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**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.

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**Additional information**

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- Mary E. Vandenack, Esq. [mvandenack@vwattys.com](mailto:mvandenack@vwattys.com)
- Jonathan G. Blattmachr [jblattmachr@hotmail.com](mailto:jblattmachr@hotmail.com)
- Martin M. Shenkman [shenkman@shenkmanlaw.com](mailto:shenkman@shenkmanlaw.com)
- Interactive Legal [sales@interactivelegal.com](mailto:sales@interactivelegal.com)
- Peak Trust Company [bcintula@peaktrust.com](mailto:bcintula@peaktrust.com)

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### **CLE Credits**

- For more information about earning CLE credit for this program or other Martin Shenkman programs please contact Simcha Dornbush at NACLE. 212-776-4943 Ext. 110 or email [sdornbush@nacle.com](mailto:sdornbush@nacle.com)

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