Follow These Tips for a Paperless Office

1. Incoming Documents

Today, most correspondence takes place electronically, making it easy for you to associate every incoming document with the correct case. Some practice management software even remembers the case that the email thread belongs to and will route it to the correct case automatically. If the software does not do so, you can simply locate the needed information and add the email and attachments to the right case.

The next conundrum you will face is what to do with incoming paper documents. Case studies show firms using the following solutions:

- Scan case letters and other documents where the existence of the original is unimportant and destroy the original
- For documents that are important, but where you do not need to keep the original t for any reason, scan to the case and immediately mail the original back to the person who sent it to you
- When the original documents are important and you need to keep them permanently or for a time - scan to a Safe Custody Register linking the document to a client or a case and store the documents in an organized Safe Custody facility.

If you deal with incoming documents in this way, there will never be a need to open a case folder manually.

The huge bonus is that everyone in the firm knows where the document is and will no longer waste time trying to find the right folder and sort through folder contents for the document.

Note that a good scanning system is critical for document handling. You should be able to scan conveniently to a case directly from a flatbed scanner next to your desk or from a multifunction device specifically setup for that purpose. It is easy!

2. Outgoing documents

Every document in every form, including emails and attachments should have its original stored in the appropriate case folder. If you do this, you are almost on your way to achieving your objectives. You are probably doing this already. If not your system is very deficient. With a good system, whenever you create a piece of correspondence or other document, the new document will be associated with the case you are working on automatically. If not, you should be able to add it to the case file easily and quickly.

3. Letters, forms, document templates and complex documents

Whether a simple letter, a complex family court form or a deed of trust, you should be able to access such items quickly. Software such as LEAP provides you with a library of forms and template documents, as well as a way to incorporate your own templates easily and economically.

If there is only one place to store the document, then there is only one way to find them! The old tendency to keep ‘a good one’ in the bottom drawer is comforting, but the problem is no one else knows it is there. By adding documents to your paperless system and associating them with the correct case, you will be able to find the template easily and so will your colleagues.

4. Invoices, bills and reports

Are you still struggling with a system where the accounting department generates all bills and you must search for a paper copy to find a previous bill? While such is still the case for many small law firms, there is no longer any need for a bookkeeper to be involved with a bill.

A paperless practice management system where time tracking and expenses are always automatically up-to-date does not require a bookkeeper to complete the entries —software has been doing that work for many years. With LEAP, you can easily find, view, re-create and email (or print if you must) a bill, without a bookkeeper or paper records.

If you can, as you should be able to, recreate any report at any time, for any period, then there is clearly no need to keep reports in paper form at all. You might print them for a meeting and then throw the printout away. The data is safe in electronic storage.

While some firms even keep paper copies of receipts "for the file," doing so in the 21st century digital world is ridiculous. Your legal practice management system should make it easy for you to provide a duplicate of a receipt or any other document.

5. Time records and contemporaneous notes

Recording your time manually or even on a specially created paper 'timesheet' is inefficient and inaccurate. Written records need to be read (interpreted?) re-keyed and edited. The margins for error are high and the cost of typographical errors is enormous.

If you just record time on your smartphone or desktop timesheet instantly, accuracy goes through the roof and so will your billings. You will make more money and enjoy practicing more. And there is no paper involved.

Every lawyer has the professional obligation to make a contemporaneous record of all hours spent practicing. With good time recording, you will not need a contemporaneous record of hours, although from time to time you may need to make a lengthier comment or file note.

Whether recording time or merely making a comment on the file, having your notes electronically recorded contemporaneously, protects you in the event of client disputes and will ensure that you provide a very high level of service.

Make the Change to a Paperless Office

Success is just around the corner. Use LEAP practice management software and follow our five tips. You will impress your clients, enjoy practicing law more and lower your costs simultaneously. Why wait?

For more information on how LEAP software can make your 21st century paperless office a reality, visit www.leap.us or call 844-702-LEAP to schedule a live demonstration.