

The Clark County Bar Association is pleased to announce its

Thirtieth Nuts and Bolts Lecture:

The Paperless Office

Presented by Jane Clark, Art Kohn, Scott Edwards & Leslie Brown

Wednesday, June 12, 2013, 3:00 PM – 5:00 PM, at the Red Lion at the Quay

The cost is \$50 for CCBA members, \$70 for non-member attorneys, and \$25 for non-attorneys. This will get you 2 CLE credits and the speaker's prepared materials to download. There is an extra fee if you want to pick up the materials at the door.

➔ *Eat. Drink. Learn.* ➔

To register: Call the CCBA, (360) 695-5975, OR email:

CLE@ccbawashington.org, OR FAX this flyer back to the CCBA at (360) 737-6891

with your NAME _____

PHONE # _____, **BAR NUMBER** _____

and EMAIL ADDRESS _____

~ Payment can be mailed to 500 W. 8th Street, Ste 65, Vancouver, WA 98660 or via credit card over the phone ~



Jane Clark is an attorney specializing in Medical Malpractice cases. She handles cases in both Washington and Oregon. She set up her own law firm, Jane Clark Legal PC, in 2011 and transitioned successfully to a paperless office. Jane is Chair of the CCBA CLE committee, President Elect for the CCBA and an adjunct professor in the Psychology Department at Portland State University.



Art Kohn obtained his PhD from Duke University. He is a professor at Portland State University and runs a media Company - AK Learning, which develops online training. His entire media operation is paperless, utilizing the full range of modern digital tools.



Scott Edwards: After graduating *cum laude* from Gonzaga University School of Law, Mr. Edwards worked for the largest insurance defense law firm in Portland and later as an in-house defense attorney for a national insurance carrier. After honing his legal skills defending personal injury and construction defect actions, Mr. Edwards joined the law firm of Schauer mann Thayer Jacobs & Staples, PS as an associate in December of 2011. Like the other attorneys at the firm, Mr. Edwards dedicated his practice to representing those injured by the negligence of others. Mr. Edwards joined the firm as a partner on May 1, 2013.

Leslie Brown is a paralegal in Jane Clark's office operating and managing the paperless office on a daily basis.

An outline for this presentation appears on the next page.

Summary and Outline

How much paper does your office produce and waste? How much money do you spend on postage and printing? How much time does your secretary spend filing? How frustrating is it to wait for documents to arrive in the mail? How long does it take you to find documents in the file? Does your server ever go down? How frustrated are you when you are out of the office and do not have access to an essential item in your file?

All of these and many other problems can be resolved by moving to the paperless office. This can be accomplished using inexpensive hosted solutions from Google, Microsoft, and others.

During this Practice Management CLE we will demonstrate the paperless system, which works equally well with an internet based "cloud" system such as Google docs, or can be used with the more traditional server.

The following topics will be discussed and demonstrated:

Documents

1. Scanning and organization of documents;
2. Search functions
3. Security issues/Confidentiality
4. Formats - word/pdf/Google docs
5. Sharing between files and users
6. Use of spreadsheets for client lists, task allocation, closed file information etc

EMail/Gmail

1. Email transmission of documents;
2. Use of Client folders for storage
3. Use of general folders to retain and easily access and locate general information on legal or related issues
4. Search capabilities
5. Instant chat
6. Google calendars - use of multiple "turn on and off" calendars
7. Calendaring Deadlines eg Statute of Limitations
8. Tasks
9. Accessibility via mobile devices eg Iphone

Advantages of a Paperless office

1. Accessibility (access files anywhere or any time with internet access)
2. Searchability - fast location of information
3. Saving on costs - mail, printing, staff time
4. Storage

Case Management Software - Needles

- a. A brief overview
 - a. "Today" Screen
 - b. "Party" Screen
 - c. "Case" Screen
 - d. "Checklist" Screen
 - e. "Request" Screen
 - f. "Notes" Screen
- b. Specific to Personal Injury Cases
 - a. "Insurance" Screen
 - b. "Value" Screen
 - c. "Negotiations" Screen
- c. Needles in Other Types of Cases
 - a. Bankruptcy
 - b. Collection
 - c. Construction Defect
 - d. Criminal
 - e. Estate Planning
 - f. Family
 - g. Immigration
 - h. Probate
 - i. Worker's Compensation
 - j. Internal HR
- d. Why?
 - a. Case/Attorney Reports
 - b. Conflicts
 - c. Checklists
 - d. Calendaring
 - e. Forms/Documents
 - f. Marketing