

# PAPERLESS LAW FIRM

## CHECKLIST





## How to Achieve a Paperless Law Firm.

A paperless law office isn't a unicorn. Its achievable, and more importantly: it's a good idea.

Law firms large and small are mired by boxes of paper files that take up a lot of physical space and make finding what you're looking for difficult (at best) and time consuming. Imagine having organized, electronic versions of old and current matters, documents from war rooms past: perfectly organized and instantly searchable. It's not a pipe dream: In today's age of legal technology and cloud-based solutions, it very achievable.

### WHY TO GO PAPERLESS

There are a myriad of benefits of a paperless law office. Here are the top ones.

1. Enhanced security with electronic files.
2. Your clients expect you to be paperless.
3. Search: instantly find the files you're looking for.
4. Access documents anywhere (with the Cloud).
5. Centralize and share all documents.
6. Stay organized and efficient.
7. Save time and money.

(Learn More: [7 Reasons to Implement a Paperless Law Firm.](#))

### CHECKLIST

We recommend using this checklist as an action plan when taking your law firm paperless.

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Going paperless isn't just possible: *its a good idea.*

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## The Checklist >



### Map Out Your Firm's Document Workflow

Understand and document how documents enter and are processed within your firm. This will help you define policies to convert and maintain documents in electronic form. For example:

Document Source	Process	Save	File
<b>Incoming Physical Document</b> (such as by Mail)	-> Scanned and OCR'd	-> Saved to DMS	-> Matter
<b>Incoming Electronic Document</b> (such as by email or fax)	-> Saved from Email / Fax	-> Saved to DMS	-> Matter
<b>New Document Creation</b> (by a member of your firm)	-> New Document Creation	-> Saved to DMS	-> Matter



### Implement Scanners

Get and implement scanners: Industrial-strength multi-functions for your whole office to share, or individual scanners at each employee's desktop (or both).



### Setup Mobile Scanners

Standardize and deploy mobile scanner apps for your team's smart phones and tablets. This makes scanning possible and easy no matter where your team is working.



### Define Hard-Copy Retention Policies

Your retainer agreement for new clients should spell out your document management process. Let them know that you will retain originals until 30 days after the matter is closed.



### Implement Electronic Signatures

Sign up for and implement an Electronic Signature solution. This will allow you to send documents to other for signature--and sign off on documents sent to you.



### Implement OCR

OCR (Optical Character Recognition) converts scanned documents from image-based files to text-based files that can be indexed and searched. Some scanners include this software; we recommend OCR be performed by your Document Management software.



## Continued ...



### Implement Document Management Software

A Document Management System (DMS) is the hub of your paperless law firm. A DMS is where you will store, organize and manage documents for your firm and for each matter. We recommend a DMS with the following functionality:

- Document Index & Search
- Document Version Control
- Office + Outlook Integration
- Integrated OCR
- Document Check-In/Out
- Scan & Fax Integration
- File & Folder Permissions
- Document Tagging / Profiling



### Bring Your Legal Documents to the Cloud

Once you have a Document Management System, you'll need to migrate or "back-fill" your legacy documents and matters. Make sure this is done by someone very familiar with your document management software and your firm's document tagging conventions.



### Train Your Team

Plan and perform firm-wide training of all of your new paperless tools and policies, including your Document Management software, scanners, policies and procedures.



### Set a Deadline for Ending Paper Files

You have to have a plan for *completing* your paperless journey: and that plan must include a deadline. Once your software and hardware are in place set a deadline for when paper files will be no more.



### Inform Your Clients

Let your clients know that your future-looking law firm is now completely paperless. Inform them that you will retain originals until their matter is closed, at which point the client has 30 days to pick up originals from your office before they are destroyed.



### Celebrate!

You've done it! You now have a paperless law firm. Think of everyone you'd like to thank, open the champagne and enjoy your organized, clutter-free paperless law office.

**Congratulations!**



## About Uptime Legal Systems

Uptime Legal Systems helps law firms manage and grow their practice with cloud, legal technology, and marketing services.

Named an Inc. 5000 Fastest Growing Private Company in 2014 and 2015, Uptime Legal is North America's leading provider of cloud services to law firms. As a full service legal technology provider, Uptime's offerings include Private Cloud for law firms, Document & Email Management and Web Design and Internet Marketing. Uptime has offices in Minneapolis and New York.



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