

# Paperless Office

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The paperless office is getting more press now than ever, and lawyers should consider this as an option for practice management. There are several reasons to go paperless:

- It can save you money. You won't need file cabinets, which saves you space. You won't use reams of paper or toner, which directly affects your overhead. I replace my toner every three years or so.
- It is easy to locate documents and files quickly
- All Texas courts will require e-filing by July 1, 2016, so everything will need to be digital anyway.
- Filing is easily done on your computer when you receive a document, so there are not piles of paper cluttering your desk.
- You are not paying an assistant to file.
- There are no storage costs when a case is concluded. If you use Dropbox<sup>1</sup> or other cloud storage services, you can access your documents from anywhere with an Internet connection and a computer or mobile device.
- And when you use Dropbox, if disaster strikes and your office burns down or floods, your files are still safe. There is a story of an attorney in Alabama whose office was broken into and her computer and hard drives were stolen. Because she stored her files on Dropbox, she was able to get her practice up and running in a matter of hours.

## Equipment and software needed

First, you will need a desktop scanner. A recommended one is the Fujitsu Desktop Scansnap ix500, which comes in versions for both PC and Mac. It can scan 50+ pages at a time and is small enough to sit on your desk. I have the scanner set to perform Optical Character Recognition (OCR) on documents so that even PDF documents are searchable. For instance, say you stored a document in PDF on "Collections." Normally this would not be searchable by your computer, but after OCR is performed, the search will pull up every document on your computer that included the word "collections."

- You will need PDF software—Adobe Acrobat Professional has been the gold standard, but there are other options that are less expensive, including PDF Pen and the free Apple software Preview.
- Computer—You will need a computer, of course. If you do not have a computer, we need to talk!
- Dropbox or other cloud computing storage—This is essential if you want to make your paperless office mobile and efficient.

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<sup>1</sup> Dropbox is an Internet storage service that cost \$100 per year for 100 GB of storage as of 2013. I have used it for years and only used 32 GB to date.

- Backup—If you have a paperless office, your file cabinet is your computer. It needs to be backed up early and often, both locally and in the Cloud. I suggest using both cloud-based backup and a local hard drive. If you have a Mac, the Time Machine software will back up your computer every hour.

## Ethical considerations

### Confidentiality

A paperless office will usually require you to have off-site storage of your electronic information. Chances of your information being hacked into is remote, but you should take the following steps to safeguard confidential information.

- Have a strong password. There are Web sites that will evaluate prospective passwords by how hard they are to hack. I used to use a six character password until the Web site<sup>2</sup> informed me that it would take a determined hacker .54 seconds to break my password. Now my password has 16 characters and the Web site informs me that it will take a hacker 2 trillion years to break it. I can live with that risk.
- It is pretty simple to encrypt<sup>3</sup> your confidential documents using software. You should consider doing it. Use software such as Data Now that will work cross-platform, both on your computers and your mobile devices. As you know, most of your documents are not confidential, so encrypting those that are is not a huge burden. Just remember your password so you can decrypt the document when you need to.

### Disclosure to clients

Another ethical consideration is disclosing cloud storage to your clients. In my legal services agreement, I have a paragraph informing the client that I have a paperless office, that I do not keep original documents, that I do not keep any paper documents, that documents are kept in cloud storage, and that at the end of the case I will give them a DVD containing the case file if requested.

### Your file system

You should create a filing system on your computer that works for you. It should be intuitive and easy to save documents in the correct locations. I have a file with case names and then sub-files with headings like “discovery,” “pleading,” etc. When I save a particular document, I start with the date and then the document name. On the date, I put the year, then month, then day. That way the files show up in chronological order. For instance, June 19, 2013, would look like “130619.” Try it. It works.

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<sup>2</sup> Howsecureismypassword.net.

<sup>3</sup> Encryption makes a document unreadable to anyone who does not have the proper software and password. It appears as random symbols to anyone who attempts to hack into your documents.