



Work from Home Technology Tips

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This article provides an overview of different types of technology that can help you practice safely and efficiently from home.

The rapid shift from office settings to working from home can feel daunting. You might feel as though you need to build everything immediately. But you don't have to buy a bunch of expensive new technologies all at once. Consider your immediate practice needs, the needs of your staff, and the needs of your clients. Then fit available technology to you and adapt as your practice evolves.

The services, products and providers named below are non-exhaustive. LAWPRO and practicePRO do not endorse third party products or services. Where such products or services are listed, they are provided as examples only. Lawyers should consider the appropriateness of such products for their practices.

Hardware

The key is to find a set-up that is secure and works for you.

- ✓ Computer: Whether it's a desktop, laptop or tablet, Mac or PC, as long as it meets your needs and gets you to your files and systems, you're good to go! Make sure you have anti-virus software installed and updated, and that you have passwords for the computer and key software platforms. Consider using two-factor authorization and biometric identification if it is available.
- ✓ External monitor(s), keyboard and mouse: Keep things comfortable and productive. A large, high resolution external monitor or multiple monitors can greatly enhance productivity by allowing you to work across different documents and systems without opening and closing windows. They also reduce eye strain. Get a keyboard and external mouse to enhance productivity and the right ergonomic setup. If you're stuck using a laptop or smaller screen, try to avoid hunching over the keyboard or leaning into the screen to see. Zoom in if you need to. Take regular breaks to stretch.
- ✓ Scanner: Scanning documents helps you maintain your files electronically, and reduce physical files at home. There are scanning products that you can use on your smartphone or tablet, as well as desktop scanners with the ability to handle multipage documents. For a further discussion, see [this article](#).
- ✓ Printer: If you can't go paperless, look for a printer that fits your printing needs. If it's wireless, make sure the network is secure and password protected.
- ✓ Phones:
 - Cell phones: Whether you use an iPhone or an Android cell phone, keep it secure. Secure it by PIN, fingerprint ID and/or facial recognition if available. Consider installing a "Find My Device" app, and put emergency information on your lock screen. Ensure that you can wipe your phone remotely. Keep systems up to date. And buy a good protective case to protect your investment!
 - VOIP phone systems: VOIP (voice over internet protocol) phone systems have come a long way on quality and service. They can be an inexpensive way to have a phone number that works from anywhere (as long as there is internet available). Most VOIP systems include core features such as voicemail, and can be configured to or automatically include international and conference calling.

- ✓ Fax: Yes, lawyers sometimes still need to send or receive materials by fax. While you can have a fax as part of your home office, and there are fax/printer hybrid machines as well, there are many programs that can send and receive faxed from your computer.
- ✓ Network: If you always work from home, you may have a hard-wired network in place. If you have a 'work from anywhere' setup, use a VPN to protect against cyber risks.
- ✓ Server: You may currently have a server for your firm. If it was stored at your physical office, now is the time to consider your remote server needs and location, or moving to the Cloud.

Moving to the Cloud

Cloud based systems can help you work from anywhere. As you move documents to the cloud, you will need to consider security and client confidentiality. See our short article [How to Safely Put Data in the Cloud](#) for guidance.

Video Conferencing

Video conferencing helps you stay connected to clients. [Zoom](#), [Skype](#), [GoToMeeting](#), Facetime, Whatsapp and other tools can help you meet clients online and maintain a face-to-face relationship.

This [Videoconferencing Checklist](#) will help you manage the steps you need to take before, during and after a video conference meeting with your client.

Software and Apps

As you move to remote work, you may want to consider changing from software systems that require in-person set-up and updating, to software service products and applications. These allow work from anywhere, potentially reduce IT costs and can increase productivity.

- ✓ **Office productivity software**

Products such as Microsoft 365 are available for both Macs and PCs. Pricing is on a per-user subscription basis and cloud storage is available. Google G Suite is another option. Confirm your storage needs before determining what package is right for you.

- ✓ **Online work spaces**

Work spaces such as [Microsoft's One Note](#) and [Evernote](#) are versatile tools that can help with all sorts of tasks including taking notes, capturing ideas, clipping materials from the web or elsewhere, saving scanned documents, sharing with teams, creating to-do lists, and doodling (during your mental health break).

- ✓ **Task, project management and workplace collaboration tools**

Tools like [Trello](#) and [ToodleDo](#) can help you manage tasks, work flow and collaboration while reducing email back and forth.

[Microsoft Teams](#) and [Slack](#) also offer collaborative platforms which can help remote teams work collaboratively.

✓ **Voice dictation**

[Dragon Speech Recognition](#) remains a leader in the field. There are also a range of free and subscription based services available.

✓ **Editing tools**

Editing tools can help us become clearer communicators. For example:

[Wordrake](#) works directly within Microsoft Word and makes edits in a track-changes style for your consideration. The edits, which you decide whether to accept, are aimed at reducing wordiness.

[Grammarly](#) checks grammar and tone for communications across email, social media and certain document project software. The Tone Detector helps you check for tone, which can help you avoid pushing send on an angry first draft.

[Text Expander](#) allows you to save time by saving snippets (such as paragraphs or standard signatures) and using shortcuts to insert the information without using copy/paste.

✓ **Calendaring tools**

Gone are the days of email or phone tag to check for availability. Online scheduling tools such as [Doodle](#) and [Calendly](#) are free and let you spend less time on scheduling meetings and more time getting work done.

✓ **E-signatures**

As lawyers move towards electronic signatures, there are different tools available to proceed securely. [DocuSign](#) and [Adobe Sign](#) are examples of e-signature solutions. Lawyers must remember that electronic signatures may not be permitted in all circumstances.

✓ **Practice Management Software**

There are several different practice management software providers available for Ontario lawyers: [Clio](#), [Cosmolex](#), [Ghost Practice](#), [LexisNexis®](#), [PCLaw®](#) and [Matter 365](#) are examples of these products. These each offer different solutions that can help you work on your files from anywhere, manage calendaring and timelines, and streamline client communication. Certain practice management software solutions also include time and expense tracking and online billing solutions.

✓ **Accepting online payments**

There are a range of solutions to make it easier for lawyers to accept payments from clients. From general credit card payment solutions such as [Square](#), to law firm specific solutions such as [LAWPAY®](#), e-commerce solutions are becoming more widely available for lawyers regardless of practice size. If you operate a trust account, you will need to make sure that your payment solution can accommodate payments into trust.

Keep exploring

Technology to assist lawyers in their practice continues to evolve. To learn more about the range of products see our [Technology Products for Lawyers and Law Firms](#) for further resources. To learn about how to get the most out of your existing products, see if there are free webinars or online instructional videos. Websites such as [Capterra](#) and [Lawyerist](#), can give you a sense of available products and how to leverage your existing technology (although certain product listings may not be available for Ontario lawyers). Check for CPD sessions that address legal technology for your practice area. Finally, talk to your staff and your colleagues about what technology tools are working for them and their unaddressed technology needs.

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