# Client portals
## improve information security and client service

### What is a client portal?

Wikipedia defines the term client portal as "an electronic gateway to a collection of digital files, services, and information, accessible over the Internet through a web browser. The term is most often applied to a sharing mechanism between an organization and its clients."

Why is it important for lawyers to provide client portals? The legal process generates documents containing sensitive information, and those documents should be shared frequently with clients. The delay of postal delivery is generally not adequate for today's expectations. Email has become the default digital business communication tool. But email is not secure. It travels across the internet as plain text and is relatively easy for a knowledgeable transgressor to intercept. Encrypting email provides security but it is still email, which can be caught by spam filters or lost in an inbox.

While there are business tools appropriate to securely store and share documents, programs designed with lawyers in mind require less customization and are generally the best choice. This is especially true for solo and small firm lawyers without a dedicated in-house IT department. My view is that paying for a practice management software subscription is one of the best investments one can make regarding client file management. That cloud-based practice management tools also provide secure client portals just makes them an even better bargain.

## Portals provide superior client service

Many of today's clients have experience with secure portals. Banks, phone and internet providers, hospitals, physicians, physiotherapists and other health care providers have turned to client portals to engage with clients and patients. Clients are increasingly comfortable with and expect secure portals when working with professionals.

The organization of client documents and information within a portal can be a valuable client service, especially when a client needs to review matters while traveling or for consumer clients who are not used to retaining and organizing important paperwork. Portals help clients see their documents and the status of their matter in a way that can help build client confidence and trust.

## Portals Can Enhance Security And Reduce Risks

Client portals are simply the best and most secure method to share documents in many cases. While most information related to a client should be treated as confidential, we must also appreciate that bad actors seek personally identifiable information such as financial account numbers, credit card numbers, birth dates associated with the names and the like. So, you cannot assume you won't be a target.

It is simply unworkable to make individual determinations about which documents are too sensitive to email and which can be emailed on a case-by-case basis. It is far better to build a secure system for sharing digital information and then use it for all client communications and document sharing (except the few that have requested traditional mailing). Client portals are that system. Portals also provide confirmation that a client has received and reviewed a particular document. Email can still be used for non-sensitive matters such as scheduling.

# Portal options:

## Practice management software and standalone services

Most smaller law firms without full-time IT staff should consider cloud-based practice management software solutions that include client portals. These online practice management solutions can provide both the organizational structure for law firms to manage their client file documents and portals for the firm to securely share information with clients. Your client portal should make it easy for clients to upload documents to you securely. For a list of practice management providers, see LAWPRO's Technology Products for Lawyers and Law Firms resource.

Standalone file sharing services can similarly provide many client portal functions. Some examples include Microsoft 365, Dropbox Business, Sharefile and Google Drive. There are many others. Generally, these file sharing services enable the client to securely upload documents to the lawyer, including larger files.

In either case, when considering a portal, lawyers and firms should make sure that the portal meets key security requirements. You and your clients should be maintaining strong passwords, and two-step verification can help secure the portal. Another consideration is where the data is stored. Some portals store all Canadian client documents on Canadian Data centers. This should be confirmed with the provider.

## The future of portals

Ambitious law firms may develop different types of client portals. If you represent clients in a particular industry, it might be full of news and information related to that industry. A law firm catering to individual consumer clients may build a portal with a wealth of basic information that may lead to other engagements.

## Closing the portal

If the client portal is used for only sharing documents related to a matter, then the portal should be closed at approximately the same time that the client file is closed. You do not do clients any favors by leaving a portal open for many months after a client's matter has been concluded. The idea is not to exclude the clients from their information. Rather, it is to assist them in saving their information before the portal is closed.

## Conclusion

Sharing of digital documents will increase and lawyers have an obligation to securely handle that information. Most law firms will use portals because it is the simplest and most efficient way to share a series of documents as the representation progresses. Thinking of the firm portal as your online entrance for clients may lead to many creative ideas. ■

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