



Professional Liability Fund presents

Harnessing Technology to Improve Your Practice

1.5 Practical Skills MCLE Credit

www.osbplf.org

503-639-6911

1-800-452-1639

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About Our Speakers

Sheila Blackford received her BA from Mills College and her JD with Tax Law Concentration from University of the Pacific, McGeorge School of Law. A member of the Oregon State Bar since 2000, she is the former Editor-in-Chief of Law Practice, the magazine published by the American Bar Association Law Practice Management Division. She is a Fellow of the American Bar Foundation, a member of the ABA Women Rainmaker's and of the ABA Law Practice Division Publications Board. She is a member of the OSB Public Service Advisory Committee.

Ms. Blackford has been a Practice Management Attorney for the Oregon State Bar Professional Liability Fund since 2005. She has been an adjunct professor of Law Practice Management at Lewis & Clark Law School and at the School of Law at University of Oregon. A former sole practitioner, she provides confidential practice management assistance to Oregon attorneys to reduce their risk of malpractice claims and ethics complaints. Besides her legal experience, she has over 10 years of teaching and marketing experience.

Hong Dao received a B.A. from the University of Denver and her J.D. from Drake University Law School. She is a practice management attorney for the Professional Liability Fund, providing confidential practice management assistance to Oregon attorneys to reduce their risk of malpractice claims, enhance their enjoyment of practicing law, and improve their client relationships through clear communication and efficient delivery of legal services.

Before joining the PLF as a Practice Management Attorney in 2014, Ms. Dao worked as a staff attorney at the Oregon Law Center for over four years, presenting community education programs and representing, advising, and advocating for clients in employment, consumer, and housing law matters. Prior to that, she worked as a contractor with the Criminal Division of the U.S. Attorney's Office. She has also served as adjunct instructor of business law at Portland Community College.

Rachel M. Edwards received her JD from Willamette University College of Law. Ms. Edwards is a practice management attorney for the Professional Liability Fund, providing confidential practice management assistance to Oregon attorneys to reduce their risk of malpractice claims, enhance their enjoyment of practicing law, and improve their client relationships through clear communication and efficient delivery of legal services.

Prior to joining the Professional Liability Fund staff in 2016, Ms. Edwards was in private practice for four years, including work as an Oregon Department of Human Services Adoption Contract Vendor Attorney. Her areas of practice included Social Security disability, family law, adoption, and estate planning cases.

Harnessing Technology to Improve Your Practice

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PLF PRACTICE AIDS LINKS22









Send Texts
Through Computer



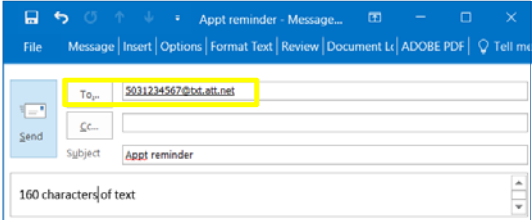
What you need:

- Client's cell phone number
- Client's phone carrier
- Carrier's SMS gateway address

<https://www.osbplf.org/inpractice/send-text-messages-to-your-clients-without-using-your-cell-phone/>

Steps for sending text through computer:

1. Compose a new email
2. In "To" field, insert client's 10-digit phone number (no hyphens) followed by @gateway address
3. Write message under 160 characters.
4. Hit "Send."



Use client portals

- Communicate and share documents
- More secure
- Clients have 24/7 access to info



Conferencing Made Easy



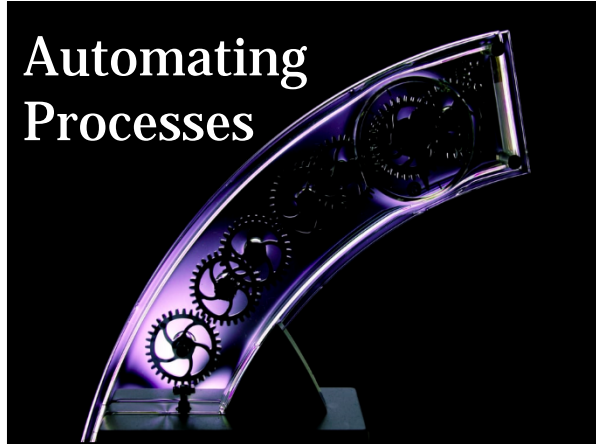
Conference Calling Video & Voice Calls

Free	UberConference.com	Appear.in
Paid	ConferenceCalling.com	Zoom















Talk to the client



in front of you.



Intake and onboarding

- Online scheduling |   
- Online forms |   
- Electronic signing |   
- Online payment |   
- Workflow automation tool |  

**G
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People Against Illegitimate Debt

Billing by Software

- Improve client relations
- Improve profits
- Reduce errors and disputes

Stand-alone Software

(Desktop)



(Cloud)



Packaged Software

(Cloud)



Online Payment

Easy and convenient for clients
Prompt payment for lawyers



Practice management

All-in-one software that automate
many of a law firm's operations



Document Assembly

Robotic document drafting:
Automatically fills in correct data



- Save time
- Reduce errors
- Boost productivity



Voice recognition

Dictation, device control, and more

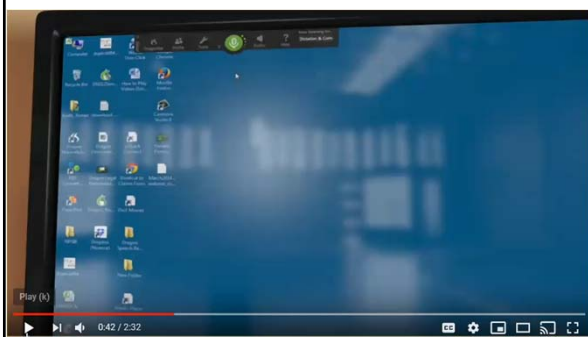


- Automatically transcribe speech into text
- Edit and format documents
- Control computer's programs and web browsers



- Dictation
- Fewer features

Voice recognition in action





Protecting Client Data

Encrypting Emails

Risks of sending unencrypted emails

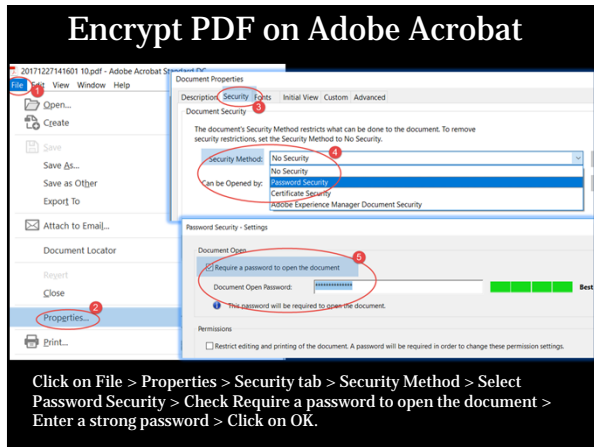
- Intercepted or viewed by unintended parties
- Breach of client confidentiality
- Potential malpractice issue

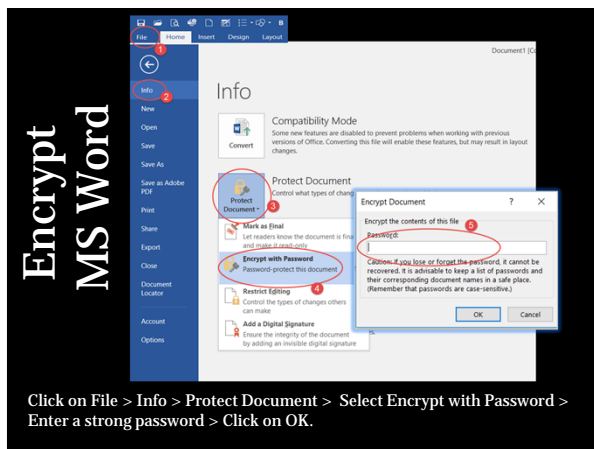
Protect against risks by encrypting emails

Tools to Encrypt Emails

Outlook Users	Digital ID
Encrypted webmail	ProtonMail Hushmail StartMail
Email encryption software	Trustifi TitanFile virtru zix CITRIX ShareFile







Cloud Security



Why encrypt before uploading to cloud storage?

- Prevent access by provider
- Make file sharing more secure
- * Not rocket science *

<https://www.osbplf.org/inpractice/understanding-security-when-using-cloud-storage/>

Encryption Software for Cloud Storage

boxcryptor
odrive.
Cryptomator

Zero-knowledge Cloud Storage Providers


SpiderOak
tesorit
sync.com
pCloud



Full Disk Encryption

Makes data on computer unreadable without decryption key

Prevents unauthorized access when computer is lost or stolen

 **Windows**

Bitlocker

- Built-in full-disk encryption
- Only available in Windows 7, 8, 10 Pro or Enterprise version

<https://support.microsoft.com/en-us/help/4028713/windows-10-turn-on-device-encryption>
<https://www.howtogeek.com/192894/how-to-set-up-bitlocker-encryption-on-windows/>

Third Party Encryption Programs

- VeraCrypt
- DiskCryptor
- COMODO Disk Encryption

Comparison chart: https://en.wikipedia.org/wiki/Comparison_of_disk_encryption_software

 **Mac OS**


FileVault 2

- Built-in full-disk encryption
- Only available in OS X Lion or later

<https://support.apple.com/en-us/HT204837>

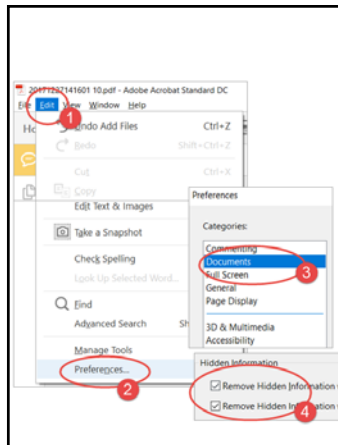






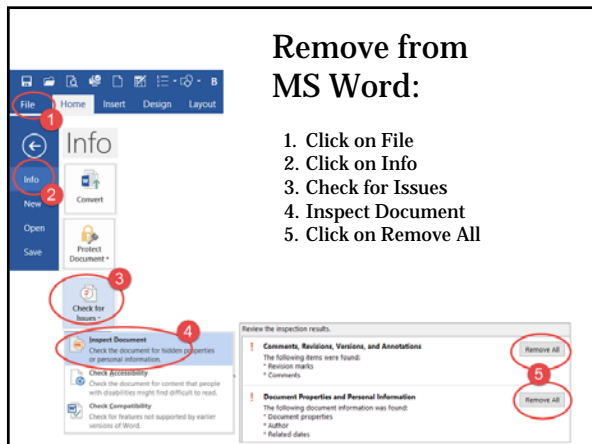
Confidential information or information prejudicial to the client may be revealed through metadata

Prevent inadvertent disclosure by scrubbing metadata before exchanging documents



Remove from PDF:

1. Click on Edit
2. Click on Preferences
3. Select Documents
4. Select when you want hidden info removed
5. Click OK



Remove from MS Word:

1. Click on File
2. Click on Info
3. Check for Issues
4. Inspect Document
5. Click on Remove All

Print to PDF:

1. Click on File
2. Click on Print
3. Select Adobe PDF from printer menu list
4. Click on Print
5. Rename and save the PDF file



Cyberattacks and Scams

Phishing

Web 8/23/2019 8:41 AM

LBS Bank <custserv@hikum.ra.lms> **Sender's email address doesn't look right**

New Security Step - Action Required

LBS Bank

Dear valued customer,

We are pleased to inform you that we've implemented new security measures to protect your account with us. We now require all our customers to use two-factor authentication to verify their identity before using our online banking system.

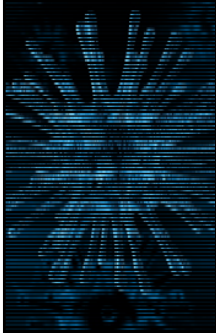
Please activate this security feature at [www.lbsbank.com/securityact2fa/](http://osmoka.com/grba/login1.htm) **Actual link takes you to another website**

You will be asked to verify your identity and choose a method of authentication. If you do not verify your account information, we will restrict access to your online account for security reasons. **Refers to threats**

Thank you for your cooperation.

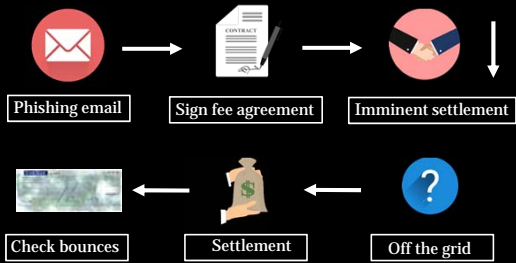
Sincerely,
LBS Bank Online Team

Malware Infections



1. Weak security
2. Download/install software/app
3. Click on:
 - Infected ads
 - Pop-ups
 - Bad/spoofed links
 - Bad email attachments

Financial Scams

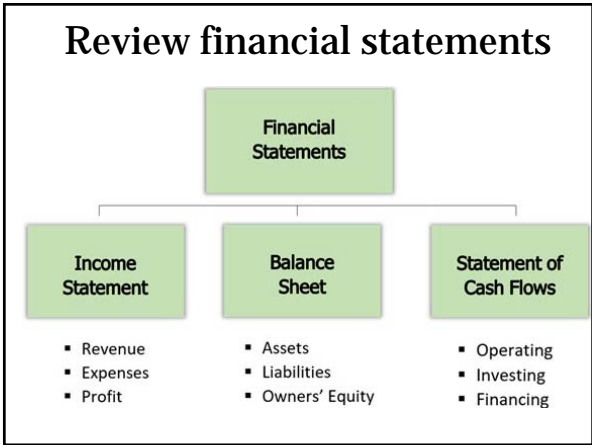


Improving Attorney Experience





Manage your firm's financials



The Income Statement

ABA Law Office
Profit & Loss Statement
January - December 2018

Income	
Legal Fee Income	\$93,417
Reimbursed Client Costs	\$3,710
Total Income	\$97,127
Costs of Goods Sold	\$0
Total COGS	\$0
Gross Profit	\$97,127
Expenses	
Fees and assessments	\$4,200
IT support	\$2,500
Marketing	\$2,000
Office supplies	\$1,145
Parking	\$720
Postage and delivery	\$500
Rent	\$1,275
Shredding service	\$1,035
Telephone expense	\$1,890
Travel expense	\$6,470
Utilities	\$1,951
Website & SEO	\$650
Other expenses	\$5,000
Total Expense	\$29,336
Net Operating Income	\$67,791
Net Income	\$67,791


Move tasks along

TO DO	DOING	DELEGATE	DONE
Task 1	Task 5	Task 8	Task 10
Task 2	Task 6	Task 9	Task 11
Task 3	Task 7		
Task 4			

- Card system
- Drag-drop functionality
- Deadline reminder

<https://trello.com>

Balancing act...



you are the sum of more
than your roles.

Manage Deadlines

Malpractice Risk:

- Missed deadlines












Reduce Risk By:

- Use reliable calendaring system
- Promptly enter deadlines and reminders

Consider:

- Sync calendar across all devices
- Use rules-based calendar software

Rules-based calendaring software

Stand-alone rules-based calendaring software	Practice management software integrates w/ stand-alone tools	Practice management software w/ built-in rules-based calendaring
	 	
	   	 

Preparing for disasters with a written Disaster Plan

1. Daily, automatic offsite backups
2. Plan B for business continuity
3. Comprehensive emergency response plan
4. Inventory of client files and office contacts
5. Alert and notification procedure
6. Secure client portals
7. Insurance is a priceless necessity



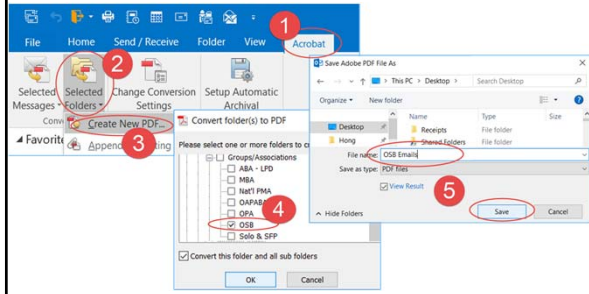
Overwhelmed by Emails?



- Create folders & automatic rules
- 4 Ds: Delete, Delegate, Defer, Do

Save emails as one PDF

1. Click on Adobe tab
2. Click Selected Folders
3. Select Create New PDF
4. Choose folder to save
5. Rename file and click Save





Saving text messages

1. Screenshots
2. Third party applications

<https://www.osbplf.org/inpractice/saving-text-messages/>

Saving Texts Using Third Party Apps

iPhone

- iExplorer (Mac and PC)
- Decipher Text Message (Mac and PC)

Android

- SMS Backup & Restore
- SMS Backup+
- Super Backup & Restore

Useful Article: "Documenting Text Messages for Trial or Legal Matters,"
<https://deciphertools.com/blog/documenting-text-messages-for-legal-evidence-or-court/>

Mobile Scanning

Turn your phone into a portable scanner



- Captures 4 corners of a document; not background
- Save as PDF & perform OCR
- Enhance and annotate scanned images
- Integrate with cloud storage

Scanning Apps:

CamScanner Scannable by Evernote
Google Drive's App Genius Scan



Print & Save Webpages

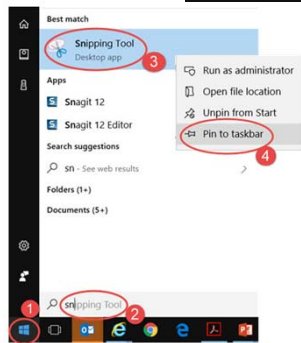
- Make any webpage print friendly
- Remove annoying graphics
- Add it to your browser
- Get a button for your website



<http://www.printfriendly.com/>

Screen Captures

Windows Snipping Tool



1. Click on Windows button
2. Type "snipping tool" in search box
3. Right click on the result list
4. Select Pin to taskbar

What the Internet Knows About You (and Your Clients)

- Social media
- Web browsers
- Computing devices
- Internet of Things (IoT)

Lawyers: Privacy | Ethics
 Clients: E-discovery



PLF Resources

www.osbplf.org

- Over 90 free or low cost CLE programs in various formats (streaming, MP3, CD, DVD)
- Over 300 practice aids
- Newsletters & publications
- Practice Management Assistance
- Oregon Attorney Assistance Program

PLF Blog inPractice

Practical Advice for Oregon Lawyers

Subscribe at:
www.osbplf.org/inpractice

PLF Resources

Discounts

Professional
Liability Fund

PRACTICE MANAGEMENT
ASSESSMENTS & EXEMPTIONS
COVERAGE
EXCESS COVERAGE
CLAIMS
ABOUT PLF
Q&A SERVICES
BLOG

FORMS

PRACTICE MANAGEMENT ATTORNEYS

RIIRREF

BOOKS FROM THE PLF

INPRACTICE BLOG

SERVICES

ABA RESOURCES

DISCOUNTS

OREGON LAWYERS' CONFERENCE ROOM

NON-MEMBER LOGIN

Billing & Timekeeping

- TimeSolv

Business Productivity

- PDF Fusion
- Perfect Authority
- Ruby Receptionist
- WordPerfect X9

Conflict Checking Software

- Client Conflict Check

Editing for Legal Profession

- WordRake

Email Encryption

- Trustifi

Marketing

- LawLytics

Practice Management Software

- Clio
- CosmoLex
- MyCase
- Rocket Matter
- Practice Panther

988-431-6475

Other Resources

Cybersecurity Training

- BrightWise (<https://www.bright-wise.com>)
- Inspired eLearning (<https://inspiredelearning.com>)
- KnowBe4 (<https://www.knowbe4.com>)
- Proofpoint (<https://www.wombatsecurity.com>)
- Webroot (<https://www.webroot.com/us/en/business/security-awareness>)

Lynda.com

- Technology Overview
- Productivity Tips: Using Technology

Oregon E-court

Self-help:

<https://oregon.tylerhost.net/ofswb>

- Web training sessions
- Training videos
- User guides

Oregon State Bar Legal Ethics Line: 503-431-6475

Contact Us

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rachele@osbplf.org

free and confidential

These PLF Practice Aids can be found at <https://www.osbplf.org/practice-management/forms.html> or at the links provided below.

1. Saving Text Messages as Part of The Client File
(<https://www.osbplf.org/assets/forms/pdfs//Saving%20Text%20Messages%20as%20Part%20of%20the%20Client%20File.pdf>)
2. Protecting Yourself and Your Law Firm From Data Breach Checklist
(<https://www.osbplf.org/assets/forms/pdfs//Protecting%20Yourself%20and%20Your%20Law%20Firm%20from%20Data%20Breach%20Checklist.pdf>)
3. How To Backup Your Computer
(<https://www.osbplf.org/assets/forms/pdfs//How%20to%20Back%20Up%20Your%20Computer.pdf>)
4. What To Do After A Data Breach
(<https://www.osbplf.org/assets/forms/pdfs//What%20to%20Do%20After%20a%20Data%20Breach%20-%20April%202016%20In%20Brief.pdf>)
5. Cash Flow Worksheet 12 Month
(https://www.osbplf.org/assets/forms/practice_forms/Cash%20Flow%20Worksheet%2012%20month%20-%20legal%20size.xls.xlsx)
6. Disaster Planning and Recovery Checklist
(<https://www.osbplf.org/assets/forms/pdfs//Disaster%20Response%20and%20Recovery%20Checklist.pdf>)
7. Disaster Planning and Recovery Resources
(<https://www.osbplf.org/assets/forms/pdfs//Disaster%20Planning%20and%20Recovery%20Resources.pdf>)
8. ABA Technology Resources
(<https://www.osbplf.org/assets/forms/pdfs//ABA%20Technology%20Resources.pdf>)