

Stairway to Paperless Heaven

By: Jacqueline King

On a daily basis paralegals are tasked with an endless amount of work. Remember Mount Correspondenceville? A whole chain of work mountains await you each day. One nervous breakdown at a time. Calendars, tasks and deadlines, oh my! Not only do paralegals climb mountains, but we perform miracles too. Like finding that one random document with the snap of a finger. You know, that one document from opposing counsel two years ago buried in the midst of 20,000 plus documents. Now, not tomorrow. No problem! Ten years ago I would have said taking a picture of air would be easier. But alas, we live in the 21st century. Although it isn't quite like Marty McFly predicted, we are now light years ahead in the technology game.

Technology in the legal field has changed. Dramatically. In the not so distant past all you had to work with was the chicken scratch your boss calls writing or a twangy dictation you had to translate. That's fun. Ever worked for a southerner? Ever tried to decipher what they say? I know, I am one. Most people cannot understand me. I cannot understand myself half the time. In addition, file management was done by a paralegal's bestie, the Post-it note. Everything went on Post-it notes: appointments, tasks, deadlines, phone messages, lunch orders and random thoughts. We loved the Post-it note! Some still do. Every desk had a paper calendar with Post-its littered throughout the calendar. How else were you to know what date the complaint had to be filed, when the answer was due or who had court and where. More importantly you could count down the days to vacation. Lucky for you (and your boss) we now have far superior ways to keep your supervisors organized. But more importantly, technology keeps you sane and employed.

Let me preface this by saying: Go paperless! Now. It is important to your well-being and your job. Achieving a paperless office will be hard. Convincing your boss, harder. It will test every ounce of patience you have and you will question your sanity. You may look around and think it is not possible, but I have lived to tell the tale. It really is possible. See, easy. Now that I've convinced you of that, here are my choices of top programs you need to manage your rockstar paralegal life. Tell your boss to hand you the credit card. While they are at it, give you that raise for being a paralegal genius.

I. File Management

Worldox. Remember that name. It is the best thing since the invention of the World Wide Web. Two short years ago I had everything on a shared drive that the entire firm could access. You thought you loved Post-it notes. My love for a folder on the shared drive knew no bounds. I had folders for everything. Pleadings, discovery and depositions. I broke these folders down by party, date, witness, favorite color, etc. Okay, maybe not that bad, but you get the picture. When I look back I cannot for the life of me understand how I found anything.

Worldox prides itself on being an effortless document and email management system. Yes, you read that right, a two for one deal. Email is now our primary form of communication. Remember when no one but you could see your emails. Now, imagine you can see every email in a particular file. You no longer have to wonder if your attorney sent an email or if it that same email received a response. It's there. All at the tips of your perfectly manicured nails. The file management Gods have shined upon us with Worldox. A file is meticulously maintained, categorized to your liking and searchable. Oh the search feature. The search feature is something dreams are made of. Ladies and gentlemen you really can find a document in 2.5 seconds. I am able to spend more time working, or filing my nails according to my boss, and less time hunting for a mythical document. If you do nothing else I say, convince your boss you both need Worldox in your life.

Worldox is your document management and Amicus is your file management. There are several programs on the market, but Amicus so far has given our firm the most bang for our buck. Amicus gives your firm calendaring, time keeping, contacts, file assignments and task management all in one. The key to Amicus is utilizing all of its features. Since our firm implemented the use of all features our work flow is easy like Sunday morning. The most important feature you will use is your tasks. One of the worst things we could ever hear as a paralegal is that we missed a statute of limitation. Someone has to take the fall and who do you think that someone will be. You may as well volunteer as a tribute. May the odds be ever in your favor. I promise missing a deadline won't be pretty. Amicus has several ways to make sure this doesn't happen, but using the task feature and learning how to set precedents to each file will make sure you don't miss a statute, ever.

II. General Software

Now that you can manage your files, you will need to have the proper programs to generate the work. First and foremost, get an updated version of Microsoft Office. Although you can still use your old version, each version has a life cycle. There will be no new updates and if you start having problems with it, who you gonna call? Not Microsoft.

Next, spend the extra money and get Adobe Pro. The extra features pay for themselves. Remember, you're paperless. Why should you print a letter, have your boss sign it, scan it and then email it? I'm a huge proponent of working smarter, not harder. Plus, we can save a few trees along the way. With Adobe Pro, you can draft your letter, convert it and have your boss digitally sign it. You just saved two steps and ten minutes work. Also, how happy will your client be when you start saving them money.

Speaking of working smarter. Remember when we had to Bates number documents with a stamp? I would rather watch Frozen on repeat, for days, than hear the sound of the Bates stamper on thousands of documents. Step away from the stamp and let it go, let it go! Adobe Pro allows you to Bates number in seconds. Also, when your boss decides to rearrange the production at the last minute (because does that ever not happen?), you can change the Bates number without feeling like you are in the movie Groundhog Day.

The programs above are essential for any law firm to be well run and well maintained. Our clients pay us to get them through traumatic times in their lives. They should not be paying us to manage their files in an archaic manner. The North Carolina Rules of Professional Conduct require attorneys to maintain competence, including in the technology field. Technology isn't going anywhere. You can either get on board or get left behind. So, take the lead and help relieve some of that added pressure from your boss' everyday workload. And while you're at it, raise your glass for being the rockstar paralegal that you are.

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