The Florida Bar Continuing Legal Education Committee and The Solo & Small Firm Section present

Small Firm Reboot: Gearing Up for Efficiency and Success

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

January 19, 2018

Live Presentation:

DoubleTree by Hilton at the Entrance to Universal Orlando
5780 Major Boulevard
Orlando, FL 32819

Course No. 2593R
Are you getting the most from your Member Benefits?

### Practice Resources

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Visit www.floridabar.org/memberbenefits for a complete list of member benefits
Common Questions About CLER

1. What is CLER?
   CLER, or Continuing Legal Education Requirement, was adopted by the Supreme Court of Florida in 1988 and requires all members of The Florida Bar to continue their legal education.

2. What is the requirement?
   Over a 3 year period, each member must complete 33 hours, 5 of which are in the area of ethics, professionalism, substance abuse, or mental illness awareness, and 3 hours in technology.

3. Where may I find information on CLER?
   Rule 6-10 of the Rules Regulating The Florida Bar sets out the requirement. All the rules may be found at www.floridabar.org/rules.

4. Who administers the CLER program?
   Day-to-day administration is the responsibility of the Legal Specialization and Education Department of The Florida Bar. The program is directly supervised by the Board of Legal Specialization and Education (BLSE) and all policy decisions must ultimately be approved by the Board of Governors.

5. How often and by when do I need to report compliance?
   Members are required to report CLE hours earned every three years. Each member is assigned a three year reporting cycle. You may find your reporting date by logging in to your member portal at member.floridabar.org.

6. Will I receive notice advising me that my reporting period is upcoming?
   Four months prior to the end of your reporting cycle, you will receive a CLER Reporting Affidavit, if you still lack hours.

7. What happens if I am late or do not complete the required hours?
   You run the risk of being deemed a delinquent member which prohibits you from engaging in the practice of Florida law.

8. Will I receive any other information about my reporting cycle?
   Yes, you will receive reminders prior to the end of your reporting cycle, if you have not yet completed your hours.

9. Are there any exemptions from CLER?
   Rule 6-10.3(c) lists all valid exemptions. They are:
   1) Active military service
   2) Undue hardship (upon approval by the BLSE)
   3) Nonresident membership (see rule for details)
   4) Full-time federal judiciary
   5) Justices of the Supreme Court of Florida and judges of district, circuit and county courts
   6) Inactive members of The Florida Bar
10. Other than attending approved CLE courses, how may I earn credit hours?
Credit may be earned by:
1) Lecturing at an approved CLE program
2) Serving as a workshop leader or panel member
3) Writing and publishing in a professional publication or journal
4) Teaching (graduate law or law school courses)
5) University attendance (graduate law or law school courses)

11. How do I submit various activities for credit evaluation?
Applications for credit may be found on our website, www.floridabar.org.

12. How are attendance hours posted on my CLER record?
You must post your credits online by logging in to your member portal at member.floridabar.org.

13. How long does it take for hours to be posted to my CLER record?
When you post your CLE credit online, your record will be automatically updated and you will be able to see your current CLE hours and reporting period.

14. How may I find information on programs sponsored by The Florida Bar?
You may wish to visit our website, www.floridabar.org/cle, or refer to The Florida Bar News. You may also call CLE Registrations at 850/561-5831.

15. If I accumulate more than 30 hours, may I use the excess for my next reporting cycle?
Excess hours may not be carried forward. The standing policies of the BLSE, as approved by the Supreme Court of Florida specifically state in 6.03(b):
... CLER credit may not be counted for more than one reporting period and may not be carried forward to subsequent reporting periods.

16. Will out-of-state CLE hours count toward CLER?
Courses approved by other state bars are generally acceptable for use toward satisfying CLER.

17. If I have questions, whom do I call?
You may call the Legal Specialization and Education Department of The Florida Bar at 850/561-5842.

While online checking your CLER, don’t forget to check your Basic Skills Course Requirement status.
PREFACE

The course materials in this booklet were prepared for use by the registrants attending our Continuing Legal Education course during the lectures and later in their offices.

The Florida Bar is indebted to the members of the Steering Committee, the lecturers and authors for their donations of time and talent, but does not have an official view of their work products.

**CLE Credit**

(Maximum 7.5 hours)

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Seminar credit may be applied to satisfy both CLER and Board Certification requirements in the amounts specified above, not to exceed the maximum credit. Refer to Chapter 6, Rules Regulating The Florida Bar, see the CLE link at www.floridabar.org for more information about the CLER and Certification Requirements.

Prior to your CLER reporting date you will be sent a Reporting Affidavit (must be returned by your CLER reporting date). You are encouraged to maintain records of your CLE hours.

**CLE Credit is not awarded for the purchase of the course book only.**

**CLE Committee Mission Statement**

The mission of the Continuing Legal Education Committee is to assist the members of The Florida Bar in their continuing legal education and to facilitate the production and delivery of quality CLE programs and publications for the benefit of Bar members in coordination with the Sections, Committees and Staff of The Florida Bar and others who participate in the CLE process.

**Course Classification**

The Steering Committee for this course has determined its content to be INTERMEDIATE.
SOLO & SMALL FIRM SECTION

Sean Desmond — Chair
Jennifer K. Griffin — Chair-elect

FACULTY & STEERING COMMITTEE

Barbara Leach — Program Co-Chair
Renee Thompson — Program Co-Chair

Daniel S. Aller
Sean Desmond
Gordon Glover
Kevin Johnson
Adriana Linares
Barbara Leach
Liz McCausland
Teresa Byrd Morgan
Twyla Sketchley
Judge Diana Tennis
Zack Zuroweste

CLE COMMITTEE

Jenifer S. McCaffrey Lehner, Tampa — Chair
Terry L. Hill — Director, Programs Division

For a complete list of Member Services visit our web site at www.floridabar.org.
LECTURE PROGRAM

8:30 a.m. Late Registration

8:45 a.m. Opening Remarks - Segment I
Sean Desmond

9:00 a.m. - 9:50 a.m. Getting the Most out of Microsoft
Adriana Linares

9:50 a.m. – 10:00 a.m. Break

10:00 a.m. – 10:50 a.m. Do I Need Practice Management Software
(panel discussion of three practitioners, two of whom use different practice management software and one who uses software that is free or already purposed—such as using Quickbooks for timekeeping and Excel for invoicing, etc.)
Kevin Johnson, Barbara Leach, Zack Zuroweste

10:50 a.m. – 11:00 a.m. Break

11:00 a.m. – 11:50 a.m. "Day in the Life" Lawyers Use of Technology
(another panel discussion featuring three tech-savvy practitioners who walk attendees through how they use technology on a daily basis)
Liz McCausland, Renee Thompson and Gordon Glover

11:50 a.m. – 1:15 p.m. Lunch on Your Own

1:00 p.m. – 1:15 p.m. Late Registration

1:15 p.m. Opening Remarks - Segment II
Sean Desmond

1:30 p.m. - 2:30 p.m. Technology Best Practices
(a panel discussion focusing on higher-level concepts for example, having a protocol in place such that every piece of mail that comes into the office immediately gets scanned, also an emphasis on using a calendaring system, etc.)
Kevin Johnson, Teresa Byrd Morgan, Barbara Leach, Twyla Sketchley

2:30 p.m. – 3:20 p.m. Ethics of Social Media for Small Firms
(Ethics credit and a one to two-person presentation about using social media)
Judge Diana Tennis, Daniel S. Aller
3:20 p.m. – 3:30 p.m.  Break

3:30 p.m. – 4:20 p.m.  Data Security and Privacy
Adriana Linares
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*Liz McCausland, Renee Thompson and Gordon Glover*

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*Kevin Johnson, Teresa Byrd Morgan, Barbara Leach, Twyla Sketchley*

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*Judge Diana Tennis, Daniel S. Aller*

**No Materials**

**Data Security and Privacy**  
*Adriana Linares*

**No Materials**
AUTHORS/LECTURERS

DANNY ALLER is The Florida Bar’s Public Information Manager for Social Media. In this position he manages the daily process to expand the reach of The Florida Bar’s immensely popular social media pages. Prior to coming to the Bar, Aller worked in journalism as a sports reporter for ten years at a variety of newspapers in Florida and Georgia. During this tenure, he had interaction with the sports information staffs and athletic offices at various different levels — from high school, to college to the pros. Since coming to the Bar, Aller has helped various Sections, groups and members learn and utilize social media platforms to connect and reach their audience. He has introduced new platforms and been at the forefront of helping Bar members adapt to new technology to strengthen communication and outreach in the social media realm. Aller holds a degree in English from Florida State University.

GORDON J. GLOVER is the owner of the Glover Law Firm, with offices in Ocala and The Villages, where he focuses on plaintiff’s personal injury. Gordon earned an undergraduate and master’s degree from the University of Florida, where he was an active student leader. In recognition of his efforts, Gordon was named Outstanding Student Leader (2002 Commencement), the university’s most prestigious leadership award, and selected for membership into the University of Florida Hall of Fame and Florida Blue Key Leadership Honorary. Gordon subsequently earned his law degree from Florida State University’s College of Law. Gordon is a current member of the Florida Commission on Access to Civil Justice, The Florida Bar’s Rules of Judicial Administration Committee, and the U.S. Middle District of Florida Grievance Committee. Gordon is past president of The Florida Bar Young Lawyers Division and a past member of The Florida Bar Board of Governors, The Florida Bar’s Vision 2016 Commission, and The Florida Bar’s Code & Rules of Evidence Committee. He also served as a past Chair of the 5th Judicial Circuit’s Grievance Committee. Gordon is certified “AV” by the Martindale-Hubbell peer review rating system and has been recognized as a “Rising Star” by Florida Super Lawyers. In addition to practicing law, Gordon is involved in his local community. He is a member/past president of the Rotary Club of Metropolitan Ocala, a member of The Boys & Girls Club of Marion County’s Board of Directors, and a member of The Public Education Foundation of Marion County’s Board of Directors. Gordon is also actively involved in Take Stock in Children (which assists at-risk and low income high school students). Gordon lives in Ocala with his wife, Ashley, their 5 year old boy/girl twin children Bennett and Elsa, and newborn daughter Emmeline.

KEVIN D. JOHNSON is a shareholder of Johnson Jackson LLC. He has represented management in labor and employment law matters for more than 22 years. He advises companies about laws that affect their relationships with employees; helps solve problems when they arise; and defends companies against EEOC/FCHR charges and lawsuits filed by employees. Kevin has experience litigating cases in jurisdictions throughout the U.S., both in single-plaintiff cases and in nationwide class and collective actions. Kevin is the current chair of The Florida Bar Council of Sections. He is a member of The Florida Bar Strategic Planning Committee. He served as chair of The Florida Bar Special Committee on Technology and Office Resources, and was awarded the President’s Award of Merit for his work on that committee by Florida Bar President Greg Coleman in 2015. Kevin has served on the Vision 2016 Technology Subcommittee, and chaired both the Civil Procedure Rules Committee and the Executive Council of the Solo and Small Firm Section. Kevin was president of the Tampa Bay Chapter of the Federal Bar Association in 2013. Kevin graduated from the University of Florida Levin College of Law in 1994. He became board certified in Labor and Employment law by The Florida Bar in 2007, and he has been recognized
in the field of employment law by various publications, including *Best Lawyers in America*, as well as *Florida Trend* and *Super Lawyers* magazines.

**BARBARA J. LEACH** is the managing attorney of Barbara Leach Law, PL whose office is located in the heart of Orlando. Her firm concentrates on representing individuals and small businesses, helping them with family and bankruptcy issues and other litigation dilemmas. Ms. Leach serves on the Executive Board of the Florida Bar Solo/Small Firm Section, the Leadership Academy Committee, and the Annual Convention Committee. She’s been recognized as Legal Elite and Super Lawyers repeatedly and was one of ten members of the ABA TECHSHOW 2017 Planning Board. She served as CFAWL President 2013-14. She graduated as the Distinguished Graduate for Valencia Community College, the Outstanding Graduate for Rollins College Hamilton Holt School, and was a two-term editor on the Florida State University Law Review. Decorating hand-crafted sugar cookies is her side-hustle and her sanity-check, and you can enjoy them at babsbakes.net.

**ADRIANA LINARES** is a law practice consultant and legal technology trainer with her company, LawTech Partners. The firm's services include consulting and training for law firms, legal departments, legal aid groups and legal technology startups. Having spent her initial career-years at two of Florida’s largest law firms, Adriana went on to launch LawTech Partners in 2004. She is a frequent speaker at national technology conferences and a regular contributor to legal blogs and publications and speaks fluent Spanish. Adriana has a BA in Geography from Stetson University, an MA in Corporate Communication and Technology from Rollins College and is an IAPP Certified Information Privacy Technologist. She has been named one of Fastcase 50’s “smartest, most courageous innovators, techies, visionaries, and leaders” in the legal industry and was recognized as an ABA Journal Legal Rebel’s Trailblazer in 2018. She served as Chair of the American Bar Association TECHSHOW 2017; works as a technology consultant to the Florida Bar Board of Governors and hosts the [New Solo podcast](#) on Legal Talk Network.

**LIZ McCausland** has been practicing law for 20 years after graduating from the University of Florida with both her Bachelor of Arts and JD degrees. She was a partner in a Civil Litigation firm representing both individuals and national corporations before starting her own firm, Liz McCausland P.A. Liz concentrates in bankruptcy and mediation. She is a Supreme Court Certified Circuit Civil Mediator. She served on committees to establish both the Orlando Bankruptcy Division’s Mortgage Modification Mediation Program, as well as the Orange County Mortgage Modification Program. She has conducted over 3,000 Mortgage Modification Mediations in every district in Florida, as well as in Indiana, California, Nevada, and Arizona. She travels throughout the US to teach other attorneys and mediators how to successfully obtain and mediate mortgage modifications in bankruptcy. She also speaks on various topics as: Her speaking topics include, *How to Start Your Own Law Firm, Work Life Balance in the Practice of Law, Utilizing Tech to be More Efficient in your Practice, Retainer Agreements and Mortgage Modifications in Bankruptcy*. Liz is currently the President of the Orange County Bar Association, Treasurer of the Solo Small Firm section of The Florida Bar, and serves on The Florida Bar’s Leadership Academy. Liz’s hobbies and interests include paddle boarding, live music and boating. She loves to travel and works virtually as much as possible to be able to enjoy time with friends and family. Contact Ms. McCausland at Liz@LizLawFirm.com.

**TERESA MORGAN** has been working in the legal field her entire adult life. At the age of 22, she began working in civil litigation firms in various support positions. During this period, she obtained her undergraduate degree from the University of Central Florida, and ultimately decided to make law her career. At the age of 28, Teresa entered the University of Florida
College of Law, where she excelled in her legal studies, and graduated with honors in 1987. Teresa then began six years of service to the First District Court of Appeal as Chief Judge E. Earle Zehmer’s senior judicial clerk. As an appellate law clerk, Teresa reviewed appeals emanating from every area of state law, and drafted many appellate opinions ultimately released by the court. In 1993, Teresa and her husband decided to build their dream home on the banks of the Suwannee River in rural North Central Florida. She joined the firm of Darby, Peele, Bowdoin & Payne in Lake City, and during the next four years served as a general practitioner. In 1997, Teresa opened her own law firm and began restricting her practice to the areas of estate planning, probate and trust settlement, business law, and appellate law. When her parents began declining both physically and cognitively and she found herself immersed in the world of caregiving for aged parents, she broadened her practice to include elder law. She is deeply gratified to be able to help families effectively deal with the physical, emotional, and financial aspects of caring for their elderly loved ones. Teresa is married to Dan Morgan, and they have one child, Jason Morgan, who is an attorney for the U.S. Department of Defense, and two granddaughters, Caroline Harper and Amelia Peyton. Teresa also enjoys being “Resa” to Dan’s six additional grandchildren, Cooper, Morgan, Ashley, Latham, Reagan and Kennedy. Teresa and Dan’s family would not be complete without their pets, which include Daphne, a Maine Coon cat, and Izzie, a Chesapeake Bay Retriever.

TWYLA SKETCHLEY is a Florida Bar Board Certified Elder Law Attorney. She is licensed to practice law in Montana and Florida and founded The Sketchley Law Firm, P.A. in Tallahassee in 2002. She also is Of Counsel to the Bryan Law Firm, P.C. in Bozeman, Montana. Ms. Sketchley’s practice focuses on elder law, guardianship, fiduciary representation, and elder law related litigation. She served as the 2017 President of the Academy of Florida Elder Law Attorneys and the 2012-2013 Chair of the Elder Law Section of The Florida Bar. She is the current chair of the Montana Bar Elder Assistance Committee.

CIRCUIT JUDGE DIANA TENNIS was elected to the Ninth Circuit in 2014 and is currently seated in Orange county handling family and probate cases. Prior to her candidacy she practiced criminal defense and family law in her solo law firm for 22 years. Judge Tennis started her courtroom career at the Public Defender’s office and has tried more than 75 jury trials– including more than a dozen murder and death penalty trials. As an attorney Judge Tennis was involved many high-profile cases and her commentary and trials were regularly featured on media outlets such as In Session, 48 Hours, Greta VanSusteren. Judge Tennis was an avid Twitter user in private practice. She might still be but couldn’t confirm or deny this.

RENÉE THOMPSON as a 15-year litigator, established a reputation at a young age as a high achiever, listed among Super Lawyers since 2015, after the organization named her a Rising Star for five consecutive years. She is an active leader in The Florida Bar, and has received the President’s Award of Merit for the last two years while serving on the Board of Governors. Renée has long had an interest in alternative dispute resolution and was certified as county mediator in 2002 and thereafter as a circuit mediator in 2010. She mediates disputes in both state and federal court.

ZACH ZUROWESTE is Shareholder at Persante Zuroweste, P.A., in Clearwater. He practices probate and trust litigation, business litigation, and securities litigation. Zack graduated from Stetson University College of Law in 2006 with a joint degree in Law and a Masters in Business Administration. Since graduation, Zack has been very active in voluntary bar associations and other professional organizations. He has been active in The Florida Bar Young Lawyers Division Board of Governors, Clearwater Bar Association, Barney Masterson American Inn of Court,
Pinellas County Trial Lawyers Association. Zack has served as President of the Clearwater Bar Association Young Lawyers Division, and is currently President of The Florida Bar Young Lawyers Division Board of Governors.
GETTING THE MOST OF MICROSOFT

No Materials

By

Adriana Linares
DO I NEED PRACTICE MANAGEMENT SOFTWARE

By

Kevin Johnson
Twyla Barbara Leach
Zack Zuroweste
Do I Need Practice Management Software?

Kevin Johnson, kjohnson@johnsonjackson.com
Zack Zuroweste, zz@persantelaw.com
Barbara Leach, barbara@bleachlaw.com

Below are the questions we’d like to answer throughout this panel discussion. If you come up with questions we don’t answer, please contact us.

- Why are WE here?

- Who can benefit from Practice Management Software?

- What are the benefits WE find to using practice management software?

- How do you use it?
• How do I create institutional buy-in?

• How do you choose practice management software?

• What questions should I ask, and of whom?

• What lessons have we learned (the hard way)?
“DAY IN THE LIFE” LAWYERS
USE OF TECHNOLOGY

By

Liz McCausland
Renee Thompson
Gordon Glover
A Day in the Life

HOW THREE LAWYERS USE APPS TO IMPROVE THEIR PRACTICE AND SIMPLIFY THEIR LIVES

WHAT ARE WE ALL LOOKING FOR?

- MORE TIME
- MORE MONEY
- LESS WORK
- BALANCE
- EXCELLENT SERVICE!

What we will go over?

BEING organized IS BEING IN CONTROL
• Calendars
• Contacts
• To Do Lists
• Meetings
• Calls

Documents
How to create and organize them
If there is time...Lifestyle timesavers

Calendars and Contacts and To Dos

- Ical, Outlook or google Calendar
- Calendar5- works across platforms, todo/ reminders
- To do list considerations
  - One that integrates with my phone, ipad, desktop, watch
  - Easy to use
  - How do I input information
  - Can matters be searched or tagged @5mins
ToDos/Reminders continued

What I use:
• Amazon Echo Alexa App
• Notes, Notability, Awesome Note
• Todoist
• Evernote

Other suggestions:
• Remember the Milk
• Access from desktop and phone
• Separate To Do lists
• Free
• Wunderlist
• Phone/ Tablet/ computer
• Can be shared

Meetings

Considerations
• What do you wish to do?
  • Attend
  • Present
  • Schedule

Who will you be meeting with?
• Clients
• Others in your company in person?
• With others have ipads or do they need desktop support

What I use to schedule
• Doodle poll - online as well. The problem seems to be that the app doesn't update and sync with the responses very quickly
• Need to Meet- Outlook plug in
Fancy Hands

- Fancy Hands - via email, text, call, or apps.
- Purchase, research, forms creation
- $5 (20 minutes blocks)/ $29.99
- Make appointments/ Coordinate meetings
- Buy gifts
- Research
- Create Documents

Attendance at Meetings

What I use:
- Zoom meetings
  - Present
  - Screen share
  - Video
  - Free for 1 hour

Others - Attendance only
- Go to meetings - Free
- Facetime (video and apple only)
- Join Me - Free and you can host up to 250 people
- Skype

Presentations

- Microsoft Word 365
  - App
  - Cloud storage
  - Collaborations are supported
- Keynote - apple's presentation software
- Teletyping - Great if you are not using your ipad to give the presentation. You import your script and it will scroll as you choose.
Making Calls/ Collaborations

- Skype
  - International calls
- Call forwarding
- VoIP: Vonage ties in with Clio
- Slack: Cloud-based team communication and collaboration tool. Groups all communications on a project in one place. You can IM, email, attach documents, tag and search across conversations.

Document Creation and Organization

- Create and edit docs
- Take Notes
- Annotate or create PDF files
- Store and manage files on your tablet or device

Document Creation

Office 365 - The bomb digity

- Documents to Go
- OneNote
- Pages

Office 365 provides storage in OneDrive and collaboration - each license can be used by 5 devices
Storing Documents and Notes

I use NetDocuments and Dropbox. Other suggestions: EVERNOTE
Folders, Tags, large learning curve
Read "Evernote for Lawyers"
ScanSnap integration

Note Taking

This is very personal here are some to try

• Notability: You can also record the meeting or depo while taking notes with this one. The app also synes your notes so you can go back to the exact point of the recording. You can also email your notes as a PDF.
• Penultimate and Noteshef: allow for notebooks
• Note Taker - HD
• Notes- on ipad which has now expanded

PDF Documents

If you are going to practice you are going to need a PDF viewer and annotator.
Some suggestions:
To Read- Perfect Reader
To annotate- PDF Expert
Trying Adobe Sign- send and receive documents
Time and Billing Apps

- Probably some of the most important software
- Case Management software App may do both
- Tell Tali

Other Time and Billing Apps

- TTimeKeep, isilps (if you use timeslips)
- Billing: Square, Law Pay, Quickbooks (logmein)
- Expenses: Expensify: connects to your connect to cc and Bank accounts. It will create expense reports and will even let you scan receipts and connect them to the expense report

Apps for the Law Office on the GO

- Making sure you are able to work as easily is the key
- HARDWARE HELPS!
- Ipad Pro (w/ or w/o pen)
- Duet App
- Scanner Pro App
- Logmein App

3.8
Tracking Mileage

MileIQ - Allows you to mileage 40 drives a month for free. Pay and you get unlimited drives. You can classify business and personal expenses.

IQ Boxy - combines mileage and expense reports

News, Reading, Reference

- Flipboard (some use Zite)
- Instapaper - This is AWESOME! It takes all of the junk out like advertising and links and leaves the text so it is easy to read. You can save articles for later or share them. You can also save them to your evernote account.
- Kindle/ iBooks
- Fastcase/ WestlawNext/ Lexis/ Lawbox (free fed research)
- FedCTRecords-mobile access to pacer

The secret: Low Overhead

- Fancyhands
- Thumbtack
- Fiverr
- Dragon Dictation
Banking and Credit Card Apps

- Cash
- Venmo
- PayPal
- Square
- LawPay

Automation

- IFTTT
- Zapier (not an app but an integration)
- Amazon

Text Expander

Text expander creates a library of abbreviated directions that then turns into a library of text. You can use it for things like your signature block. Just type the abbreviation and it appears. Your goal and phone are then text.

Settings --> General --> Keyboard --> Text Replacement.
App Box Pro

- Currency
- Calculate days
- Magnifying glass
- Level
- Conversion of units
- Sales Prices

Travel

- Tripl
- Around Me
- Open Table
- Tripadvisor
- Yelp
- Wi-Finder - must download offline

Shopping

- CardStar
- Alexa
- Shipt
- Instacart
- Starbucks
**Apps to Prepare for Trial**

- **Court Days Pro** - calculate deadlines
  - IDoc Review: Tag documents that you review (Privileged, non-responsive, tag elements)
  - The Deponent: Set up outlines for all witnesses and re-use certain ones for certain types. Attach docs to Qs

**Apps for Trial**

- TranscriptPad: Carry all transcripts in one place, search, tag, color code issues
- Ijuror or Jury Star
- TrialPad: Load Doc, images, video, write, redact, callout certain parts
- Similar apps are Exhibit A and Exhibit View
TECHNOLOGY BEST PRACTICES

By

Kevin Johnson
Teresa Byrd Morgan
Barbara Leach
Twyla Sketchley
Opening Office Procedure

When opening the office and after turning off the security alarm, please do the following:

**Turn on All Lights:**

1. Hallway
2. Kitchen
3. Conference room. Turn on overhead lights and lamp. (2 overhead lights in conference room are located to the left of the entrance way behind the large plant).
4. Lobby and the light above the front door (switches are located on the wall next to the entrance to the conference room and are currently labeled.
5. TBM’s office, 2 regular light switches on wall on the right side of entrance door.

**Check the following Daily:**

1. Newspaper. TBM usually brings it in and sets it in the kitchen. If it isn’t in the kitchen, please bring it in from the front of porch;

2. Check the copy machine for faxes and deliver to appropriate recipients;

3. Check voice messages. Press VMS button on the phone, and 10#. The password is 8781#. Follow prompts. Deliver messages to appropriate recipients;

4. The pen holders on the conference table. These pens are placed there for our clients use and should be adequately filled at all times. Please make sure the card holder on this table has an adequate supply of business cards;

5. Check the conference room daily making sure that the room is tidy and presentable for consultations/meetings. Also, check TBM’s portable table which is located to the right of the entrance into the conference room. Make sure there are pens, black markers, paper towels, and that the eraser is in place. TBM does not use the pens we provide our clients, so check with Angie and/or Shana for further information on TBM’s pens; and

6. As you enter the conference room, to the right of the entrance way and attached to the wall, is a white board. Please make sure that the board is clean and completely blank each morning. TBM uses this board when meeting with clients.
**Miscellaneous Daily Duties:**

- Check the lobby routinely, fluff up the pillows, straighten up the magazines on the credenza behind the receptionist desk, keep a pen on the credenza for signing documents, or whatever the need may be. Please keep everything tidy for our clients.

- Check daily to make sure the business card holder in the lobby is adequately stocked with the cards for TBM, Angie and Shana;

- Do dishes, if necessary; (we all chip in to keep the kitchen clean); and

- Promptly at 9:00 a.m. turn off the **night service** on the phone, and unlock the front door.
Florida Courts E-Filing Portal for Probate

I. Introduction

The purpose of this guide is to provide you with the information necessary to electronically file court case documents via the Florida Courts E-Filing Portal.

First, start by accessing the e-Portal’s log-in page, by typing the following URL into your web browser: www.myfloridacourtaccess.com. You will be directed to the Florida Courts E-Filing Portal page.

To begin filing, click on either E-Filing Portal in the Menu Bar on the top of the screen or File Now!

That will bring you to the Welcome Page to the Florida Courts E-Filing Portal.
Enter your User Name and Password to Sign In to access the Portal.

User Name:
Password:
II. Administrative Links

Once you have logged in to the Portal, you will be taken to the Main page which is the E-Filing Map. The Main page presents you with two dropdown menus: 1. The My Account menu and 2. the Filing Options menu. The My Account menu allows you to make changes to the attorney’s profile. For example, this is the menu you would select to change Email Notification preferences and other user preferences.

The Filing Options menu allows you to submit filings. The Portal Filing Management Links are located in the Filing Options dropdown menu. Also, these same links are located in the Quick Links area which is in the upper right corner of the page.

III. Case Initiation

i. Filing to Create a New Case

New case filings begin from the Jurisdictional Map. Select County from the drop down or click on the county in the map. Select Case Initiation when filing a new case and then click on File Now.

This takes you to the Case Information Page.

ii. Adding Case Information

You can enter case information that will be reviewed by the county staff and accepted for filing A confirmation email regarding the filing will be sent to the email address on record and the new case number will be recorded in the email. The My Filings list will be populated with the case number in place of the “new case” text once the case number has been assigned.
There are three dropdown menus available on the **Case Information Page**: Division, Case Type, and **Sub Type**. Under Division, you will select “Probate.” Next, you will select “Probate Estate” for the **Case Type**. You will know if the **Case Type** is a “Guardianship.” Guardianship cases are not as common as Probate Estate cases in the office. Finally, you will select the **Sub Type**. Here, I have selected “Summary Administration, Estate $1000 or more.” You will know from the memo what **Sub Type** you should select. When complete, click on the **Next** button.

The process continues as you complete each page or by clicking on the top tabs (Case Information, Case Parties, Documents, Service List, Fees and Payments, and Review and Submit).

iii. **Adding Party Information**

**Select Add Party** and then Select Role and **select Filed on Behalf of**. You must complete all required fields. Click **Save**.

The deceased must be an added party. You will select their **Role** as **Decedent**. The rest of the information should be located in the newly created Probate File. In the file or on the attorney’s memo you will find the necessary names and addresses.

Click the **Save** button when entries are complete.
The next person you will add as a party is the Client. You will select their **Role** as **Petitioner**. The necessary names and addresses will again be found in the file.
Click the **Save** button when entries are complete.

The party page will refresh and the party that was just added will be displayed in the list. You can **Replace** or **Remove** a party on the case. When you have completed adding or editing party information, you will click the **Next** button and go to the **Documents** page.

**iv. Adding Documents**

Documents are added by clicking the **Add** button. Find the type of document you wish to file, type in the number of pages and then click **Choose File** to find the document you will be uploading from your computer. Then click **Save**.
The document will be pulled and added to the Portal. You should add all the documents you wish to submit with this new case on the Documents page. The documents displayed below are common documents filed at the start of a Probate case.

For confidential documents, you are required to attach the Notice of Confidential Information within Court Filing as per RJA 2.420.

Click the Next button to move on.
v. Service List
The E-File will automatically be added to the E-service List for the case. The email address listed in the account profile is the default. Any other person that files electronically to the case will be added and appear in the E-service List.

You have the ability to add Other Attorney/Interested Party to the E-service List for the case. To do this, select the My Added Attorney/Interested Parties link.

The Other Attorney/Interested Party screen will popup. Click on Add Other Attorney/Interested Party to add yourself to the E-service List if this is your first time using the Portal.
Enter and save your contact information to be added to the E-service List for the case.

Click the Next button to continue to Fees and Payments.

vi. Fees and Payments

The method of payment you will be using has already been stored for future use. There will be an itemized list of the filing fees in the Filing Fee Summary portion of the page.
vii. Review and Submit

Please Review and Submit all case information carefully before clicking Submit. If there are any changes that need to be made, you must click back to the Case Information, Case Parties, Documents, Service List and/or Fees and Payments tab(s) to make the changes re-save the information. Click **Submit** only after you have reviewed everything and made any necessary changes.

**WARNING:** As an attorney or self-represented filer, you are responsible to protect confidential information under Florida Rules of Judicial Administration 2.405 and 2.405. Before you file, please ensure that you have complied with these rules, including the need to complete a Notice of Confidential Information form or motion required under 2.405 regarding confidential information. Your failure to comply with these rules may subject you to sanctions.

******No E-service Recipients have been selected! ******
Click [Submit] only after you have reviewed everything and made any necessary changes.

IV. Resources

Florida Court Clerks & Comptrollers prepared a comprehensive manual that I would recommend to anyone with questions regarding the Portal.


The manual has links to video tutorials and other training manuals.
Morgan Law Center for Estate, Elder & Legacy Planning

Systems and Processes Guide

Systems and Processes

Probate
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Adding Documents
Service List
Fees and Payments

Administer Estate
Florida Medicaid Estate Recovery Program
Department of Revenue

Close Administration
Welcome Packet for Probate

(u:\systems\client conferences\prospective clients\probate)

Initial Consult Letter:

- Select the Initial Consult Letter that fits the letter’s method of delivery or modify template letter
- Copy and paste Client Name and Address from the appointment email
- Change day, date, and time to correspond with the client’s appointment time
  - Print on letterhead to your printer

Enclosures:

- Go back to Prospective Client Conferences folder and print the following to the Xerox copy machine:
  - Directions & Map to Office
  - Estate Information Form
    - Change Printer Format to 2-Sided and Staple
- Paperclip everything to the front of the physical file folder and give to attorney to sign the letter
- Once the letter is signed, make a copy for the physical file

Mailing the Letter:

- Fold contents in half and use 4x6 manila envelope
- Create mailing label (U:\systems\templates\labels\mailing labels (new logo))
  - Look at the label sheet to determine where the information should be entered in the template and delete all other sections
  - Enter client’s name and address making sure the text is bolded and centered
  - Print to your printer and Don’t Save Changes when closing the label template
  - Place label on the front of the manila envelope
- Affix postage using postage machine
  - Hit the Normal Preset button on the machine
  - Place package on the top of machine for weighing
- Once the machine has set postage, run package through the left side of machine to imprint postage amount on package
- Leave the package to the right of the postage machine for mailing.
I. Introduction

The purpose of this guide is to provide you with the information necessary to create diagrams.

First, start by accessing the web-based program the office uses to create flowcharts, family trees, and other organizational charts by typing the following into your web browser: https://www.lucidchart.com. You will be directed to the LucidChart page.

To access the office’s account, click at the top of the screen. This brings you the login page at https://www.lucidchart.com/users/login. Enter the registered Email Address and Password to access the account.

   Email Address:
   Password:

Once you have logged in to LucidChart, you will be taken to the MyDocuments screen. This screen shows current projects. For example, the Systems and Processes Guide visuals are located in the MLC Work Flow/ Visual Flow Project. There may be other folders for specific projects. There is a Search Documents feature that allows you to search for any documents within the various folders.

II. Create a Document

To create a new document, click on in the upper-left corner of your Documents page. The overall visual of your document will depend on the type of document you are making. This guide will focus on the creation of Family Trees, Trust Diagrams, and Workflow Visuals.

III. LucidChart Basics

The feature that makes LucidChart user friendly is that the elements are draggable. You are able to “grab” an object and drag it to the desired location. The diagramming in LucidChart begins after selecting +Document. You will be brought to the LucidChart editor. The features in the LucidChart editor are not that different from other tools for document creation.
Before you begin creating your first document using LucidChart, you should familiarize yourself with the different features. This is an important step because it will help prevent confusion later when I refer to components in the LucidChart editor by name.


IV. Family Trees

i. Change the Document Name

To change the name of your document, click on the

ii. Diagraming the Family Tree

The shapes to indicate individuals on the family tree are located in the toolbox. Click and drag two squares to the diagram with enough space between each square to later list their Date of Marriage. Also, you should keep in mind that most family trees have a few generations so you should begin the diagram close to the top of the document. The shapes already have the text feature. You should erase the text and replace it with the Client’s Name and Date of Birth for both clients.

The properties bar contains the tools for text editing.

Using the text editing options, I am going to increase the size of the text to make it easier to read for clients.
Next, you need to join the clients with a line and add text to show the *Date of Marriage*.

To draw a connecting line between the couple, hover the mouse over the edge of the first shape until a red circle appears along the border of the shape.

Drag a line from the red the circle to the other square. When you release, a line with an endpoint connecting the couple will have appeared.

Click on the recently drawn line and change the endpoint from 🔷️ to None 😕.
Now you need to add the Date of Marriage for the couple by clicking on the Date of Marriage in the toolbox and dragging it above the recently created line. If you want to avoid editing text properties by hand throughout the entire creating process, change the default style for the document at the very beginning.

If you have additional questions about working with the text in LucidChart, here is a helpful resource from LucidChart: https://lucidchart.zendesk.com/hc/en-us/articles/207300266-Work-with-Text
Now it is time to add another generation to the family tree. You will not be using lines with endpoints when creating family trees so it is another default style that can be set at the beginning of document creation. Click on the toolbox and drag and the line to the center of the line linking the clients. When you release the line, you should click on the right side of the line and drag it down so the line becomes vertical.

Another way to create a line is by clicking the “L” key on your keyboard and drag your mouse across the document to draw a line.
Now a horizontal line should be added if the clients have more than one child.

From the horizontal line, add lines that will link to the shapes for the children of the clients. You already know how to add lines and shapes so I will skip repeating this step.

Here, I modified the line shape for two of the lines from Elbow to Straight. The Straight option allows you change the angle of the lines. The Elbow option only allows lines to bend at 90 degree angles.

To modify the line shape, you should select “Line Options” in the Properties bar. The “Line Options” symbol is 📐. A window will display the available options for lines.
You can select one of the three angle types available. The default is always “Elbow.”

The next step is adding any spouses.

If there are any grandchildren they should be added to the family tree.
When the diagram is complete, click on File in the Menu Bar. You should print a hardcopy for the client file and download a copy to the electronic file.

V. Trust Diagrams

VI. Workflow Visuals

VII. Resources
Technology Best Practices-Electronic Files, Calendaring, Email, Texts

Twyla Sketchley, J.D., B.C.S.
The Sketchley Law Firm, P.A.
The Sketchley Method
3689 Coolidge Court, Suite 8
Tallahassee, Florida 32311
(850) 894-0152
www.thesketchleymethod.com
www.sketchleylaw.com

1. Are You Scanning & Saving Your Files?
   a. Do you have a standard system for saving documents?
      i. MTN## - Motions
      ii. LI##--Letters In
      iii. LO##-Letter Out
      iv. NTC##-Notices
      v. EMI##-Email In
      vi. EMO##-Email Out
      vii. MEMO##-Memorandum
   b. All court documents are electronically filed
      i. Process for scanning and saving
         1. Who e-files in your office?
         2. Is it saved in the file before e-filed?
         3. Is it saved with consistent naming system?
         4. Is a paper copy kept as well?
         5. How does the client get a copy?
   c. All court documents are served electronically
      i. Process for saving as they come in
         1. Who monitors the email for court services?
         2. Are documents saved to file as they come in?
         3. Are all files saved with consistent naming system?
         4. Is a paper copy kept for the file?
         5. How does the client get a copy?
   d. Scanning Paper Correspondence?
      i. Standardized opening of mail or intake of faxes and deliveries
1. Who gets them first
2. Are they scanned and saved to file first?
3. Is a paper copy kept for the file?
   ii. How does the client get a copy?
   iii. Do you mark them as scanned so you know which have been scanned?

   e. Scanning Your Notes?
      i. Do you take paper notes at hearings or meetings?
      ii. Do you have a system for scanning those into the files?
      iii. Do you keep them for a paper file after scanning?

2. How Are You Calendaring Events & Deadlines?
   a. Electronic Calendaring
      i. Outlook
      ii. Google Calendar
      iii. Smart Phone Calendar Apps
      iv. Practice Management System
      v. Others…
   b. Are you calendaring
      i. Events?
         1. Hearings
         2. Appointments
         3. Phone Calls
         4. Voluntary Bar Organizations
         5. Board Meetings
         6. Vacation Days
      ii. Deadlines?
         1. When responses are due
         2. Opposing party deadlines
         3. Lead time for deadlines
         4. Hearing or deposition prep time
      iii. Work time?
      iv. Marketing time?
   c. Backup System
      i. Paper
         1. Actual paper calendar or organizer
         2. Print out of electronic calendar
      ii. Electronic back up
         1. Backs up to smart phone
         2. Backs up to tablet
      iii. Cloud back up
         1. Do you know whether it is stored securely by company?
3. How Do You Manage The Email Storm You Get Every Day?
   a. Who checks your email?
   b. When do you check your email?
      i. Do you have a schedule for checking emails
   c. Have you set “rules” in your email system to filter out junk mail or potentially harmful email?
   d. Have you set “rules” in your email system to send emails from particular organizations or people to folders?
      i. Example Folders:
         1. SSF Emails (Solo Small Firm Emails)
         2. FL Bar (Florida Bar Emails)
         3. Jones v Smith (Jones v. Smith Case Emails)
   e. Do you save emails that come in for files?
   f. Do you save emails that you send for files?
   g. Do you print copies of your emails for the paper file?

4. Do You Text On Files?
   a. How do you keep track of texts?
   b. How do you store them with your files?
   c. Do you have a texting policy with your clients?
      i. What kind of information is exchanged via text?
      ii. Is there a response time for texts?
      iii. Do you tell your client whether you bill for text messages?
   d. Do you have a texting policy with opposing counsel?
   e. Do you advise your client that texts may not be secure?

5. What Does Your Back Up System Look Like?
   a. Do you have a rotating external drive?
      i. How often is it changed out?
      ii. Where is it stored?
   b. Does it back up to a cloud?
      i. How often?
      ii. Is it guaranteed to be there?
   c. Do you have a paper system?
   d. Who knows about your back up system?
      i. Employees trained?
      ii. Information technology person?
      iii. Your family members?
   e. Do you have an information technology person that assists your firm?

6. Have You Advised Your Clients About Cyber Security?
   a. Do you have clients sign up to receive their documents via email or just assume they want to?
i. Have you told them email is not secure?
ii. Have you told them how your office will respond to suspicious email from their email addresses?
iii. What is your policy if they say they are not receiving your emails?
b. Do you have an email for client’s to send emails to?
   i. Do you have a policy for receiving emails from clients?
   ii. Can they email you anytime?
   iii. Do they know that you will bill for their emails?
   iv. Do they know you whether you will respond at 3 a.m. when they email you?
c. What is your policy if your office is hacked?
   i. Have you told your clients what your cyber security policy is?
   ii. Do you have a plan for notifying clients if you have been hacked?
d. Do you allow your clients to access their files via a client portal?
   i. What kind of security does that portal have?
   ii. How do you ensure that their information remains confidential?
e. Do you have a cyber insurance policy?
ETHICS OF SOCIAL MEDIA
FOR SMALL FIRMS

No Materials

By

Judge Diana Tennis
DATA SECURITY AND PRIVACY

No Materials

By

Adriana Linares