

Technology in our new remote practice:

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**Be prepared to go 100% virtual and stay that way... for months or longer.
(and lower your overhead tremendously)***

1. No more hard copies:

a. Instead, all documents must be shared via sharing software digitally like dropbox

b. When this is over, stop using hard copies. You save on

a. Storage space for open files;

b. Storage space for closed files;

c. Shredding costs;

d. Filing costs;

e. Printing costs (*it's more expensive than you think. Ink, maintenance, updates etc and it is much faster to find something in an ocr'd PDF.*) You can do a word search and find it instantly and you can also bookmark it. Just get used to it. I combine all medical records into a single document and OCR it and bate stamp it so I can find key things instantly. You can also pull out a page and insert it in word if you have a timeline or word document.

This is important because doctors lie and they do so convincingly. They lie about what is in the medical records ON THE STAND and you don't have time to rifle thru 3,000 pages of medical records using paper copies. I've caught many an expert misrepresenting facts by having all records combined as a single PDF, then converted to OCR (Optical Character recognition) permitting me to find and search for things instantly. The end of this document shows you how to do it.

2. Signing stuff:

Contracts and other documents can be signed digitally using PDF¹

3. Get rid of your office.

Seriously. Get rid of it.

A. Your staff saves money on gas and commutes from home; If your employee drives 10 miles each way to work, then at .50 per mile for gas they save \$2,600.00 per year *and* they do not have wear and tear on their car. Furthermore, they have the extra driving time for which they are not compensated meaning if it is 30 minutes driving each way

¹ https://acrobat.adobe.com/us/en/sign/free-trial-global.html?gclid=CjwKCAjwguzzBRBiEiwAgU0FTyCx3rpSIK1mhWCG2YbGGzCUNe2rO9jsVm53kdjcGrqxvS_taoQhHBoCHI0QAvD_BwE&LeadSource=SEM&LeadSource2=NA-SEM-Google-Trial-14Day-SMB-NonBrand-PDF&mv=search&sdid=X2PHHZYP&ef_id=CjwKCAjwguzzBRBiEiwAgU0FTyCx3rpSIK1mhWCG2YbGGzCUNe2rO9jsVm53kdjcGrqxvS_taoQhHBoCHI0QAvD_BwE:G:s&s_kwid=AL!3085!3!223909088614!e!!g!!pdf%20signature

including parking they have 260 free hours per year. That is the equivalent of an additional 6.5 weeks “vacation” you are giving them by letting them work from home. The value? A typical paralegal earns approximately \$52,000.00 per year.² That means 6.5 weeks worth of their time, if they got paid for it, would be \$6,500.00 per year. So, adding the value of the freed up time and the mileage they are getting the benefit and value from working from home translates into an additional \$9,100.00 per year!

- B. You don’t have to pay rent, mortgage, insurance, utilities;
- C. YOU get to work from home;
- D. YOU avoid traffic; (ever calculate how much time you drive to and from work? Use the calculations in A above to figure out how much money *you* save)
- E. You can rent a virtual office or share one with other folks if you need to meet with clients.

1. The phones: Fix it NOW:

- a. Virtual receptionist; That frees up your staff to work with the clients. I’ve had some really *bad* ones. Finally, I found a great one. My current service is very professional, they pronounce my name correctly and are great with accuracy.
www.Answerconnect.com Currently have 100 minutes per month service plan costs \$149.00 per month. There is a \$49.99 onetime set up fee. This is a 24/7 service. The 325 minutes per month plan is \$299.00 a month. It is \$1.49 per minute for any overages.
- b. I am also told Microsoft office 365 has a free service that forwards calls from your main number to staff who are working from home using cell phones and it’s part of the package.

2. Virtual assistant: I’ve had some nightmares. I even paid a lawyer to attend a training seminar for law clerks who do remote research in India. The hourly rate isn’t bad but the work was not reliably good and the hours they billed were absurd. Then I paid a full time New Delhi lawyer to help. Awful experience. Virtual assistants are great when you are busy and you don’t have to pay them when you are not. I found a company with a good reputation. www.uassistsme.LLC. This company has fantastic reviews. For 20 hours a week (4 hours a day) it costs \$799.00 per month.

4. Hire a doctor. What if you hired a doctor *full time* to assist you in reading records, timelines, being present during depositions etc? The salary of a full time psychiatrist in India is about 18,303.00³ in US dollars.

**5. Remote clients/ remote depositions:
KEEP DOING THEM REMOTELY**

Clients:

- a. Get software, see below;
- c. You can send links to your clients who can see you by video and you can share your screen if you want to show them documents. If they don’t have a laptop. Buy a cheap

² <https://www.indeed.com/salaries/paralegal-Salaries>

³ <https://www.indeed.co.in/salaries/Psychiatrist-Salaries>

used one and put virus protection on it and loan it to the client with a release; if they are struggling, and have a smart phone, ask them to face time you and flip the camera around so you can see their screen to help them navigate this. Facetime is easier.

d. Check your surroundings. Make sure there is nothing in your background you will find embarrassing (Trust me. I learned the HARD way)

Depositions:

a. Send the exhibits combined, ocrd and batestamped, (see bottom of document on how to do this) to the court reporter ahead of time.

b. Tell him/her not to share them unless you advise, and be ready to pull certain pages out to show the witness;

c. You can see the witness, defense lawyer and court reporter. It's almost as good as being there. However, make SURE defense lawyer enables HIS video. I had a deposition yesterday where he claimed it was "broken" then forgot and accidentally connected so we could see him.

d. Make sure you ask everyone to identify themselves if they are listening in. I have had cases where defense counsel secretly had doctors listening in. If I have an expert listening in, or if I'm listening in as a consultant, I always make sure I or the other consultants are announced at the beginning of the deposition.

e. If you share your screen to show the witness a document, remember to stop sharing when you are done. I had a witness forget to stop sharing and she began opening confidential emails up during the deposition that we could *all* see.

A single out of office deposition can cost :

hotel: 2 nights:	\$600.0
meals x 9 (3 days)	\$270.00
taxi/car rental	\$100.00
airline	\$600.00
airport parking	\$90.00
<i>non billable hours</i>	
300.00 – 600.00 per hour (VERY low x 10 x 2	
days travel =	\$ 6,000.00 - 12,000.00

TOTAL COST: \$ 7,470.00 - \$13,470.00

And you STILL miss Susie's soccer game.

If the deposition is live, and the defense lawyer and court reporter are live and you want to be remote, ask the court reporter to bring a spare laptop (or loan her one) and you can watch the witness (to make sure defense lawyer isn't "helping his/her expert) etc

OR just use webex.com or other remote conferencing. Make sure you check HIPAA issues. If you have the court reporter put it on a spare laptop, you can see the witness and the witness can see you. Webex is very inexpensive.

Zoom is free but limited to 40 minutes and I've heard there are privacy issues. Pay Zoom is not expensive and easier to use than webex.

6. Working remotely:

Have your IT person set up a VPN, which permits everyone to remote in and access all data. There are many software options out there that are not expensive. Your IT person can use your server, or rent space on a virtual server, for this purpose. I was told by the folks would cost a few hundred dollars to set it up such that all staff can work remotely. I know someone in LA who was laid off due to the virus and he can help. If you want his contact information let me know.

Websites like Logmeinpro are helpful at creating a remote work environment.

7. Make sure each staff has a laptop and:

- a. Make sure remote login has a password
- b. have them sign an agreement that they can never use it on public wifi
- c. they can never loan it; and NEVER share passwords
- d. they cannot download software or anything, open emails, nothing, outside of work
- e. they continue to make sure virus protection is current
- f. they update passwords each 6 months
- g. they understand you can remotely monitor what they do
- h. They cannot access...EVER, facebook, Instagram, Amazon, twitter, (your IT guy can actually set it up to block those site)

If they don't have their own computers, buy them one. You can buy it cheaply, and designate it only for work. You can order a used one from amazon to deliver to their home. You can get a used one for less than 200.00. However, you'll need to get one with enough memory to be able to handle whatever data will be downloaded so see how much memory your files will need when downloaded and then get a laptop that can handle that. Get a used one.

5. Employee monitoring software:

If you are worried your employees are not really working or are on facebook,, you can monitor them and TELL Them you are monitoring them. Software can recreate where they went, what they did etc. Not a bad idea even if they are live and in the office.

<https://www.business.com/categories/employee-monitoring-software/>

here are some options.

<https://medium.com/@janetcpatterson/15-best-apps-for-employee-monitoring-2019-e1e378c0784d>

others as well;

You can also have webex (remote video software) result in your staff sharing his/her screen so you can just look at the video at any time and see what they are doing. You won't need monitoring software if you do it that way.

6. Your mail:

Is it safe? This article may provide you some relief.⁴

Consider having mail forwarded to yourself or a staff 's home temporarily so they don't have to pick it up in public. OR have them pick it up 2 x per week have them scan the mail AND the envelope and share it with everyone and post it and tell you what's in it.

Example:

Ms. Sims:

You received a letter from defense counsel in Smith v. Jones advising you of a depo in 3 weeks. It's posted to the file.

I also have them save it in a folder called MAIL

With the date so I can check it myself. Have that person take the scanner home so they can work from home. If it's too big, you can buy one for a couple of hundred bucks that is also a printer.

EMAIL your experts and opposing counsel and advise they must send all data digitally except for checks.

Have the U.S. post office scan your mail.

The post office will scan *outside of envelopes* so you can determine if you have critical mail to be picked up.⁵

8. Stop paying so much for trial exhibits.

- a. Osirix-viewer.com lets you create 3d exhibits for free using your client's own mri.
- b. Go to google video for examples of surgeries your client may have had for the jury to watch
- c. Go to google images for photos of cars, medical conditions... anything

9. Expert depositions:

- a. Have your client listen in and IM you (announce this on the record) It's great for marketing because they love it when you go after the expert
- b. Have another expert from Delhi to Delaware listening in (always give advance notice) This makes the DME more honest because you have a "medical interpreter" if he tries to spin the science.
- c. Take all documents you want to use as exhibits, keep them as PDF's (Adobe) and then combine them all and OCR them and bate stamp them and share them with the court reporter asking her NOT to share with defense. You instead will say, for example, "Madame court reporter please give the witness exhibits 3-16" then you attach them as an exhibit if you want, and ask the witness. How do you do that? See the tutorial at the end of this document.

10. Cool websites:

⁴ <https://www.nytimes.com/2020/03/24/health/coronavirus-mail-packages.html>

⁵ <https://techcrunch.com/2017/03/31/the-post-office-will-now-email-you-photos-of-your-mail-before-its-delivered/>

- a. <https://scholar.google.com/> this lets you find medical research and you can limit the research by author or dates and you can find how often the article is cited by other articles.
- b. <https://books.google.com/> This cite lets you actually do instant searches in a number of books. It's great for those times when an "expert" volunteers a book to be authoritative and you do a search in real time in deposition and force him to admit pages that support your position...
- c. This website lets you create video tutorials and you can sign up for free.
<https://www.techsmith.com/screen-capture.html>

*with any references above, make sure you have safe secure websites used by you and your staff that meet your bar rules and regulations as well as security of data and medical records requirements. I am not a computer specialist and this is not my field so all advice should be run through your own IT person and cross checked with your state bar regulations and rules.









Combining exhibits, or medical records, converting them so you can do a word search then bate stamping them.

How to combine documents

Here is a video showing you how to do it.

<https://www.youtube.com/watch?v=PMm4YhUcKQA>

Put all your documents you want as exhibits and save them in a folder. (see images below)

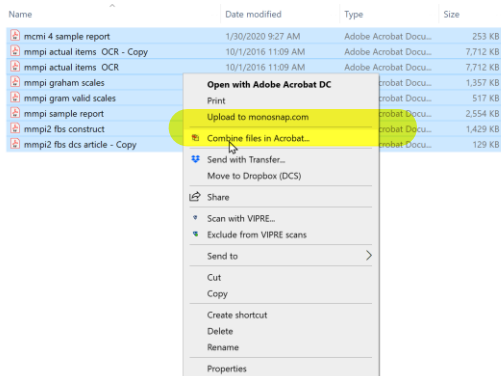
Name	Date modified	Type	Size
 mcmi 4 sample report	1/30/2020 9:27 AM	Adobe Acrobat Docu...	253 KB
 mmpi actual items - Copy	10/1/2016 11:09 AM	Adobe Acrobat Docu...	7,712 KB
 mmpi actual items - OCR	10/1/2016 11:09 AM	Adobe Acrobat Docu...	7,712 KB
 mmpi graham scales	9/25/2019 11:02 AM	Adobe Acrobat Docu...	1,357 KB
 mmpi gram valid scales	7/18/2018 10:54 AM	Adobe Acrobat Docu...	517 KB
 mmpi sample report	8/7/2019 1:30 PM	Adobe Acrobat Docu...	2,554 KB
 mmpi2 fbs construct	8/7/2019 1:30 PM	Adobe Acrobat Docu...	1,429 KB
 mmpi2 fbs dcs article - Copy	12/2/2015 12:28 PM	Adobe Acrobat Docu...	129 KB

1.

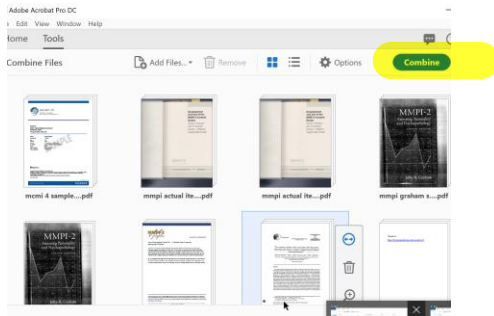
2. Make sure you use Adobe acrobat (although there are other options out there. I'm just Familiar with adobe)
3. Then click on the top document, depress the "shift" key on your keyboard, and then Click on the very last document. That then "captures" all the documents They should all be shaded in gray. See below:

Name	Date modified	Type	Size
mcmi 4 sample report	1/30/2020 9:27 AM	Adobe Acrobat Docu...	253 KB
mmpi actual items OCR - Copy	10/1/2016 11:09 AM	Adobe Acrobat Docu...	7,712 KB
mmpi actual items OCR	10/1/2016 11:09 AM	Adobe Acrobat Docu...	7,712 KB
mmpi graham scales	9/25/2019 11:02 AM	Adobe Acrobat Docu...	1,357 KB
mmpi gram valid scales	7/18/2018 10:54 AM	Adobe Acrobat Docu...	517 KB
mmpi sample report	8/7/2019 1:30 PM	Adobe Acrobat Docu...	2,554 KB
mmpi2 fbs construct	8/7/2019 1:30 PM	Adobe Acrobat Docu...	1,429 KB
mmpi2 fbs dcs article - Copy	12/2/2015 12:28 PM	Adobe Acrobat Docu...	129 KB

4. then you right click it. and when you do, a box pops up below and you click on “combine fiels In acrobat.



It looks like this



You click on the blue section that says “combine”

Now it’s combined all the documents into a single document and you can name it and save it.

Time to OCR it, using adobe pro.

This link shows you how

<https://www.youtube.com/watch?v=7Gq3ehpv-h0>

or convert it so you can do a word search. A 3000 page document may take 5-15 minutes to complete.

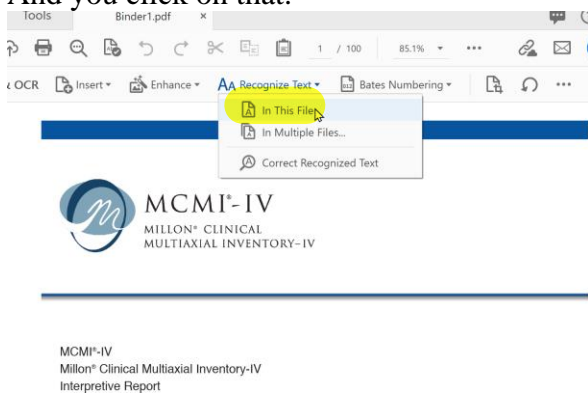
You click on the bottom part of the pdf the green icon that looks like paper coming out of a printer. See bottom right? It says “scan & OCR”



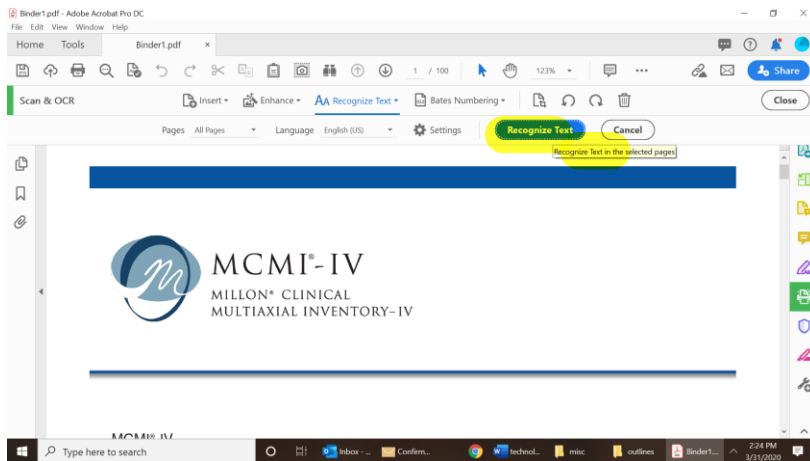
Then click on that, then a menu pops up below, click on “recognize text”



Then it asks “in this file”
And you click on that.



Then the blue box pops up that says at top right of document “recognize text”
And click on that. see below;

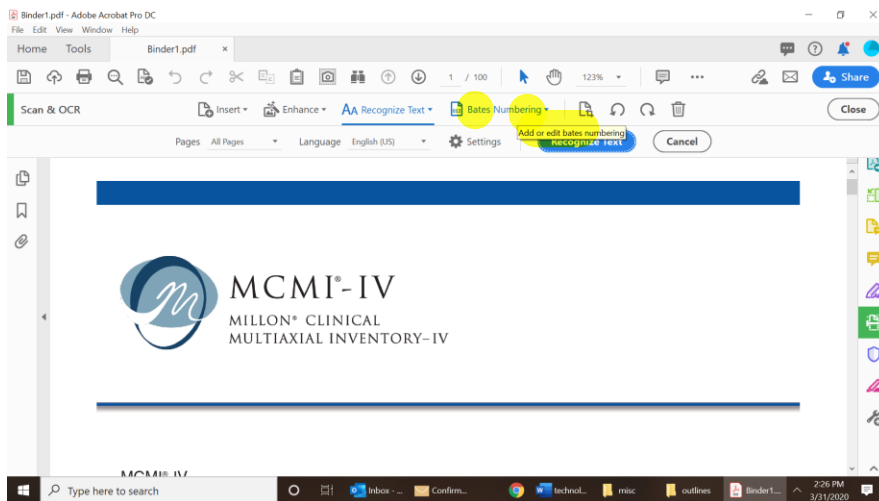


Once you click on that it will begin to convert the document so you can ultimately save it and do a word search. It may take a few moments and you won't be able to go into other PDF's while it is "working"

Once you are done. Save the changes and you are done!

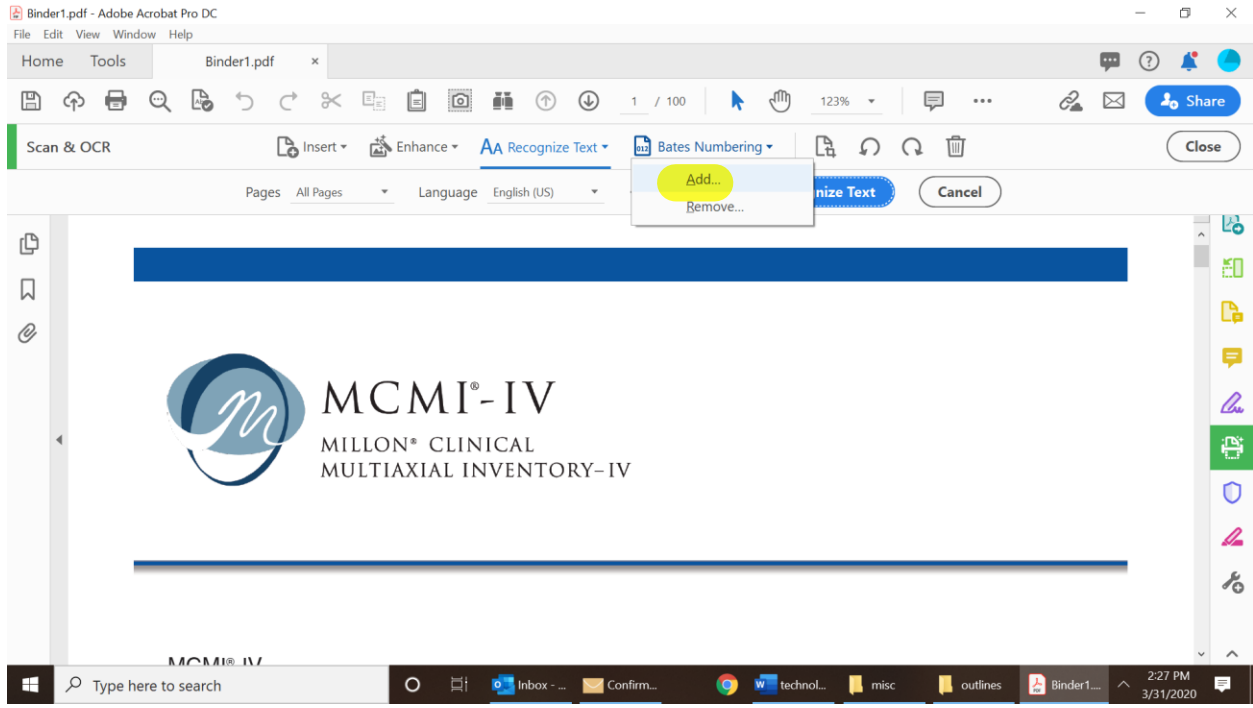
Now to bate stamp it.⁶ THE FOOTNOTE IS A VIDEO YOU CAN WATCH.

First open the document you want to bate stamp.
Then click at the where it says "bate numbering"

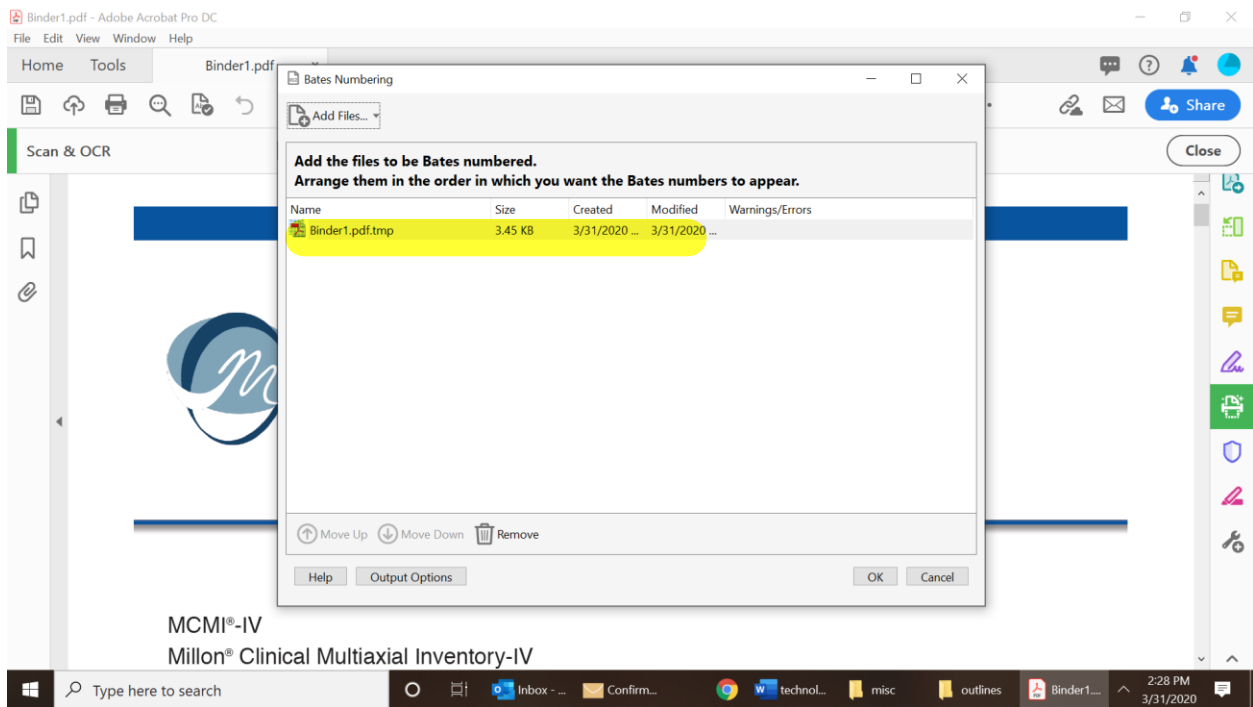


Then see below you click on bates numbering and it shows "add remove"
You click add

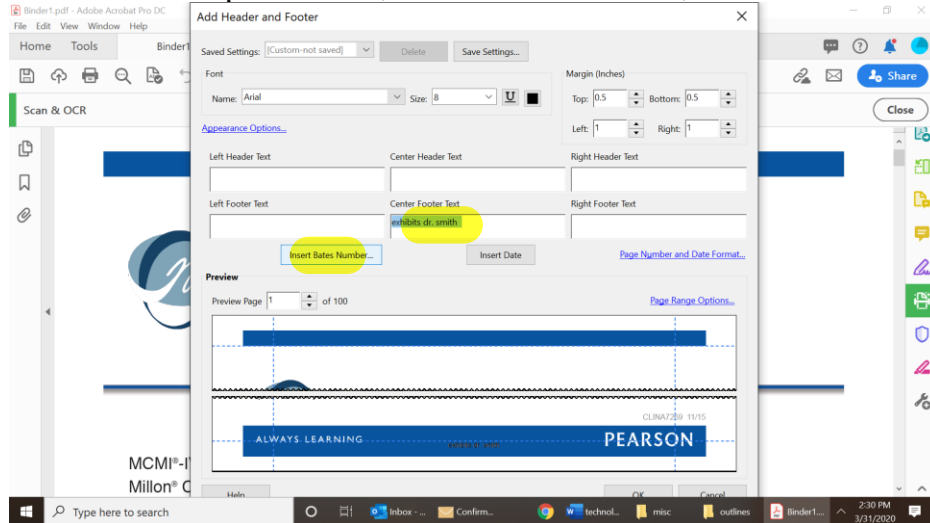
⁶ <https://www.youtube.com/watch?reload=9&v=JiU3Dqr86XU>



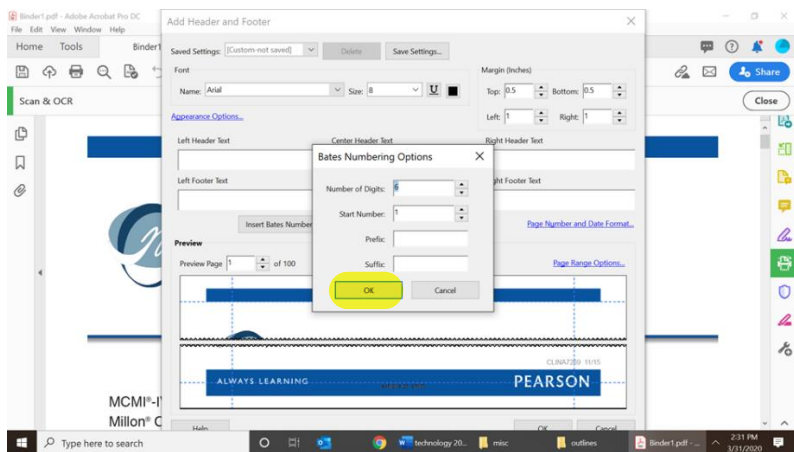
Then a name of the pdf you want to bate stamp comes up (it's the document you opened)
 Then you click on that document in gray below, and then click OK at bottom of screen



Then go in center footer text. See below Name the document. We will call this one “exhibits Dr. Smith” then hit space bar 2 x, then click on blue box, insert bates number



Then when you do this this box pops up that says “bates numbering options” Click OK on it



Then at the bottom of the screen another light blue box pops up that says “ok” click on that too and it will bates stamp the document.

Then save the document naming it Exhibits Dr. Smith” or “Combined medical records” and you are done!

You can then dropbox it to the court reporter and advise her to pull key pages after she prints them and she is to hand them to the witness but NOT turn over the entire PDF of exhibits unless you give permission.

You then say “Dr. Smith, the court reporter is going to hand you pages 35-55 of potential exhibits we sent her and I’m going to ask you about them.”

