

Law Firm Done With Paper

BY STEVEN L. BUTLER

Special to Law.com

August 6, 2009

Linarducci & Butler is a busy small law firm, helping clients navigate through the Social Security disability benefit process. Our firm typically has 600 to 800 client cases open at any given time, and client folders for each claim have a minimum of 250 pages of paper – including medical records and correspondence. It was not unusual in the past for our client files to grow to over 1,000 pages.

Over time, the document volumes from open and closed cases have placed a strain on our firm's on-site filing system with the office reaching the point where we needed more space to store files. These document volumes also led to the costs associated with document storage becoming our firm's largest monthly office expense.

But we had more than a document storage problem – our firm also had a document access issue. Client folders contain information our attorneys and legal assistants need to access quickly in response to telephone inquiries from clients and the Social Security Administration. Too often, people would go to the file room and the folder they were looking for was not there. And this would trigger a time-consuming search around the office to locate the missing information.

As one possible solution for reducing the amount paper in the office, the firm looked into document scanning outsourcing for some files but found those services to be costly. Plus, we did not want to have client documents unavailable while out of the office for scanning in case the documents were needed to address an inquiry.

AUTOMATING PAPER-BOUND PROCESSES

To reduce the demands on the office filing system and gain faster, electronic access to client documents, we made a bold decision: our firm was going to scan incoming mail and faxes, route them using office e-mail and work electronically. The firm turned to eCopy ShareScan document imaging software operating on our network-attached Ricoh multifunction peripheral.

Now, all incoming mail and faxes are scanned and sent directly to electronic client folders using eCopy Quick Connect, software which provides an intuitive, menu-driven approach at the MFP to store documents in a specific file location on our network and, at the same time, capture the associated metadata (information about the document that helps us find it when we search).

Also, the document imaging software allows whoever is scanning to preview the scanned document at the MFP to check for quality. This capability not only improved document integrity but it also saves time wasted on going back to the desktop to review scan jobs and then needing to return to the MFP to rescan any errors.

To further accelerate the document capture process, we added eCopy Barcode Recognition Services to automatically separate and name each document when we scan a batch of documents all at once. A batch can

be multiple pages of a medical record or client correspondence received into our office.

Before scanning, the user adds cover sheets with barcodes generated by our database to separate each document in the batch. Then, the document imaging software uses barcode recognition to automatically index the scanned documents to the appropriate client folder.

We found standing at the MFP scanning and naming documents to folders was time-consuming and error prone. By using barcode recognition services, we can give each document a meaningful name – not a number – which makes it easy to find the document.

We are also saving time by using barcodes. For instance, we cut the process for logging in and distributing our incoming mail by at least one hour every day.

MOVE TO A PAPERLESS OFFICE

When we looked at document scanning, we didn't start with a paperless office strategy in mind from day one. Our top goal was to find a way to access more information, more quickly. Document imaging software helped us address that challenge – and because it is so easy to use, we evolved in how we utilized the software and one day we realized we were paperless.

Our staff has welcomed the move to a paperless office because their volume of cases is easier to manage electronically. Now, they no longer need to worry about searching for missing files. And, for the first time, the firm is getting rid of filing cabinets and reclaiming office space.

Also, having the documents in electronic formats means multiple people can access and view the same document simultaneously – as opposed to making additional paper copies.

Even our firm's senior partner – who is like most attorneys – a hoarder of paper – has also embraced the change. Now, he can view the same information whether in the office or at home preparing for a hearing.

Clients have also embraced our paperless change. For clients that are PC-literate, we now return their case files back to them as PDF documents on a disc instead of stacks of paper. Our paper files that could easily grow into over 1,000 pages, now commonly have less than 25 pages total when the file is closed.

Steven L. Butler is a partner at Linarducci & Butler.

