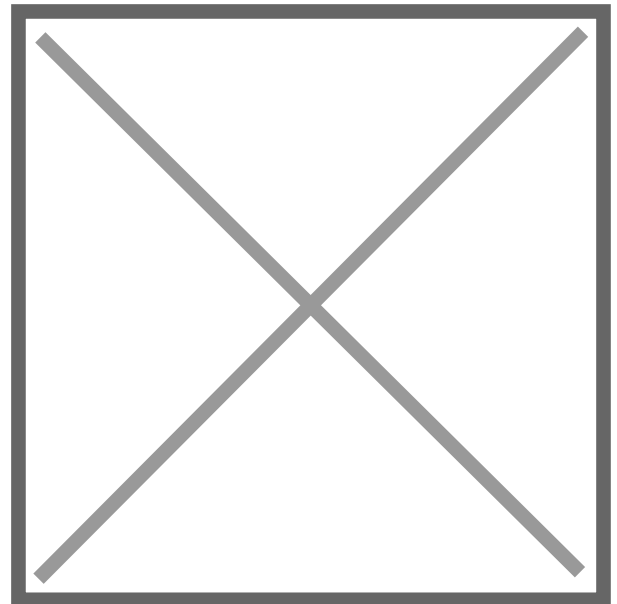


How To Go Paperless



These days, everyone talks about having a paperless office. It's a laudable goal. Your documents are secure, your office less cluttered, your files easier to get to, and it can really [increase your productivity](#). However, a lot of friction can arise when you are trying to move everything to a virtual world. Here are some ways to identify—and overcome—those pain points.

How Will I Organize My Paperless Files?

Organizing your client files on your computer doesn't have to be all that drastically different from organizing them in your office. (Note: this method presupposes that you do not have a storage software that does this for you in the background.) Instead of a filing cabinet, you can just have a computer folder with a name like *Client Files*. Within that folder, consider creating "groups" of clients to separate those clients that are active from those where the matter is concluded or you declined representation. Create a sub-folder for each client. You'll want to develop a naming convention to make sure you're consistent, but that is likely something you've already done with your physical files.

Once you've got things named the way you'd like, consider setting up a blank [new folder template](#) with all the sub-folders that you would need for each new client, such as *Billing*, *Correspondence*, and *Pleadings*.

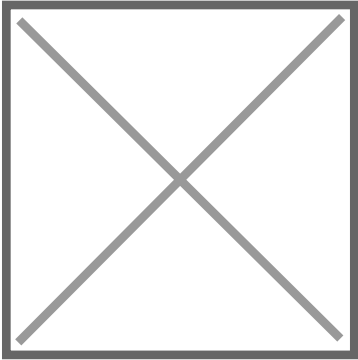
What About Notetaking?

If you take a lot of notes while talking to clients, it might be hard to envision how to integrate those into your paperless workflow. One of the best ways to ensure those notes fit neatly into your new paperless ecosystem is to leverage technology that allows you to still take handwritten notes. Using an iPad Pro with an Apple Pencil allows you to [take notes](#) just like you're using a legal pad. Except, unlike a legal pad, you can use a program like GoodNotes to turn your handwriting into text, move portions of your notes around, and automatically store your notes in iCloud or Dropbox.

How Can I Fax?

It seems like we should be well past the era of faxing, but some clients may still need to send or receive faxes. If you [use a service](#) like HelloFax, faxes can come right to your email box (and then, of course, easily added to your virtual files). HelloFax has a monthly fee, but it frees you up from keeping a fax machine, a fax line, and needing to file all that paper.

By making use of tools like this, you can stop telling yourself that going paperless is an impossibility.



[The Florida Bar Practice Resource Institute \(PRI\)](#)

Guest post by [Lawyerist.com](#)

<https://pri.floridabar.org/how-to-go-paperless/>

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