



Speakers



Hong Dao
PLF Practice Management Attorney
hongd@osbplf.org




Rachel Edwards
PLF Practice Management Attorney
rachele@osbplf.org

Topics:


1. Physical setup
2. Software and systems setup
3. Accessing files and programs
4. Employees working remotely
5. Maintaining communication
6. Handling phone calls and mail
7. Notifying clients



Physical Setup


Dedicated workspace

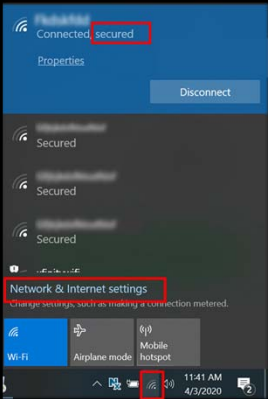


Docking station







Secure Internet Connection (WPA2)

Wi-Fi

Properties

SSID: [blurred]

Protocol: Wi-Fi 5 (802.11ac)

Security type: WPA2 Personal

Network band: 5 GHz

File Access

Paper access




Cloud access






Google Drive



OneDrive

Cloud-based products



Move tasks online

Online scheduling

Electronic signing



Professional Liability Fund

503.639.6911

CLE PRACTICE MANAGEMENT ASSESSMENTS & EXEMPTIONS COVERAGE EXCESS COVERAGE CLAIMS ABOUT PLF GAP SERVICES BLOG

← BACK TO LIST

More Than Just a Click: Automating the Client Intake Process

Date: 01/12/2019
Topic: Practice Management
Credit: 1 - PS
OSB CLE Event ID: 44233
Program Materials: [Download Program Materials](#)

The process to onboard new clients is often fraught with monotonous repetition and duplicative data entry. This CLE will cover the challenges of a traditional client intake process and provide options to streamline and automate the process. Practitioners will learn how and why automating their client intake process will strengthen business development and improve client relations. Presented by Hong Doo, RLF Practice Management Attorney.

HOW TO ORDER OR REGISTER

CHOOSE PROGRAM FORMAT

Streaming Video MP3

[ADD TO CART](#)

Cybersecurity and Employee Training

By Rachel Edwards, PLF Practice Management Advisor

An important part of reducing your firm's risk of a cyberattack is proper employee training. According to Verizon's 2018 Data Breach Investigations Report, phishing or other forms of social engineering, which are defined as fraudulent attempts through manipulation in order to obtain sensitive information, cause 93% of all data breaches. Firm employers must make it clear to employees the importance of cybersecurity. Listed below are general tips for implementing cybersecurity employee training:

- **Require social engineering awareness training.** Social engineering is defined as the act of gaining access to buildings, systems, or data by manipulation and exploitation of human psychology rather than physically
- **Protection of firm devices.** Require devices containing client data to be password protected and encrypted, especially if the device is taken offsite. Prohibit employees from leaving devices in their vehicle, even in a locked trunk. If employees travel for work-related activities, consider requiring employees to store the device in a safe in their room or at the hotel front desk. Also consider using a program that can track the location of a device and erase its contents remotely. Other options include requiring the use of "burner devices," which contain no client information on the device itself but allow for remote access through a web browser.
- **Use of personal devices.** If allowing

Video Conference Services Comparison Chart

Name	Pricing	Conference call	Video conferencing	Screen sharing	Recording	Mobile devices	Desktop & mobile access	Participant capacity	Online subscription	Security/Privacy policy
Free plan	✓/✓	✓/✓	X	No limit	✓	✓	Up to 100*	✓/✓		
Cisco Webex Meetings https://www.webex.com	Paid plan \$13.50/mo	✓	✓	✓	No limit	✓	Up to 50	✓	Security info here Privacy info here	
GoTo https://www.gotomeeting.com	Free plan	✓	✓	✓	40 min for group	✓	Up to 100	✓	Security info here Privacy info here	
GoTo https://www.gotomeeting.com	Paid plan \$10/mo	✓	✓	✓	Unlimited	✓	Up to 300	✓	Security info here Privacy info here	
Lifesize https://www.lifesize.com	Free plan (6 months)	✓	✓	X	No limit	✓	Up to 25	X	Security info here Privacy info here	
Lifesize https://www.lifesize.com	Paid plan \$18.95/mo	✓	✓	Not at this plan	No limit	✓	Up to 100	At extra charge	Security info here Privacy info here	
UberConference https://www.uberconference.com	Free plan	✓	✓	✓	✓	45 min	Up to 10	X	Security info here Privacy info here	
UberConference https://www.uberconference.com	Paid plan \$15/mo	✓	✓	✓	✓	5 hr	Up to 100	X	Security info here Privacy info here	
FreeConference.com https://www.freeconference.com	Free plan	✓	✓	X	No limit	✓	Up to 1000 for call, up to 1 hr web	✓	Security info here Privacy info here	
FreeConference.com https://www.freeconference.com	Paid plan \$9.99/mo	✓	✓	✓	✓	No limit	Up to 1000 for call, up to 15 hr web	✓	Security info here Privacy info here	
Zoom https://zoom.us	Free plan	✓	✓	X	No limit for 1:1; 40 min limit for group	✓	Up to 100	✓	Security issues recently in the news. Security info here Privacy info here	
Zoom https://zoom.us	Paid plan \$14.99/mo	✓	✓	✓	✓	24 hr	Up to 100	✓	Security info here Privacy info here	

<https://www.osbplf.org/inpractice/working-and-meeting-in-the-age-of-social-distancing/>

inPractice

Practical Advice for Oregon Lawyers

inPractice Blog • Client Portals: Take Control of Client Communication

Client Portals: Take Control of Client Communication

March 6, 2020
by Rachel Edwards



Client portals allow lawyers to interact with clients in a secure environment to accomplish tasks such as gathering information, sharing documents, and making payments for services. The word "portal" comes from the Latin term for a gate, meaning it maintains two functions. It opens to allow access but also closes to ensure security. Portals are designed to facilitate communication between attorneys and clients. Email is generally not a secure method of communication, and it can be challenging to sort through the vast number of emails we receive every day. Client

Practice Management Software



File Sharing



Handling Phone Calls

Call forwarding or porting



Check voicemail



VOIP



Virtual receptionist



Handling Mail

In office



Mail forwarding



<https://www.usps.com/manage/forward.htm>

Notifying Clients and Others of Changes by....



Voicemail



Website

Email signature block

Hong Dao
PRACTICE MANAGEMENT ATTORNEY
30122 19th Upper Business Ferry Road, Suite #300 | Tigard, Oregon 97153
p: 503-726-1400 | www.odplf.org


COVID-19 Notice: Effective March 17, 2020, the OSB Center and PLF offices will be closed to visitors and operating with reduced staff on-site, with other PLF staff working remotely. Although the PLF is taking all steps possible to avoid business interruption, we may experience some delay or interruption due to reduced on-site staff. You can reach the PLF by phone at 503.726.1400. You can also reach PLF staff via voicemail or email. We appreciate your patience in this trying time.

RESOURCES

OSB Professional Liability Fund
www.osbplf.org
 ■ Practice aids ■ Books ■ CLEs
 ■ InPractice Blog ■ InBrief Newsletter
 ■ Practice Management Attorneys ■ OAAP

Oregon State Bar
<http://www.osbar.org>
 ■ Bar Counsel Articles ■ Ethics Opinions
 ■ Legal Ethics Helpline: 503-431-6475

ABA AMERICAN BAR ASSOCIATION
<https://www.americanbar.org/>
 ■ Legal Technology Resource Center

Check out our newest practice aid  **inPractice**

Relevant blog articles:

- Staying the Course During the COVID-19 Pandemic
- Maintain Control by Narrowing Down Your COVID-19 Resources
- Working and Meeting in the Age of Social Distancing

RESOURCES FOR WORKING REMOTELY IN THE AGE OF COVID-19

Get a plan for picking up mail so you don't miss a deadline. "You've got mail" was a welcome announcement in the early days of email on AOL. You may have conquered your email inbox but are beginning to get nervously distressed at the thought of unopened mail piling up, including notices of deadlines. "Staying the Course During the Covid-19 Pandemic," has some ideas to help you.
<https://www.osbplf.org/practice/keeping-the-course-during-the-covid-19-pandemic/>

Set up a secure way to share documents with clients. Sending documents back and forth with your client doesn't have to be done haphazardly or manually. A client portal may soon become your favorite way to share confidential documents with your clients. Here is a blog post to help you get started: "Client Portals: Take Control of Client Communication." <https://www.osbplf.org/practice/client-portal-take-control-of-client-communication/>

Make it easy to get paid! If you are not already set up for sending secure invoices that can be paid with a click of a button or having a special website link in your client portal for credit card payments, now is a good time to get set up. Look at your case management program to determine how it can enable providing clients with accurate, timely billings and for streamlining being paid. If you find that the included bill paying feature doesn't meet you and your client's needs, consider alternative billing programs such as [BillTime](#), [TimeBill](#), and [TimeBill](#).

Getting set for remote signing. Make online signing available for clients to sign their fee agreement, engagement letter, other documents, and forms. Electronic signature services like [DocuSign](#), [SignNow](#), and [iSignNow](#) let clients sign on their computer or mobile device without having to print, scan, and email or mail back to you.

Offer online scheduling. Eliminate calling or emailing back and forth to schedule appointments by using an online scheduling tool that allows new clients, existing clients, and others to make their own appointments with you based on your availability. Just provide a link to the online calendar or embed it right into your website. Common online scheduling tools include [Calendly](#), [Booky Scheduling](#), and [ScheduleOnce](#).

Subscribe at:
<https://www.osbplf.org/inpractice/>

Contact Us
www.osbplf.org
 503-639-6911 | 800-452-1639

PLF Practice Management Attorneys

Sheila Blackford sheilab@osbplf.org
 Hong Dao hongd@osbplf.org
 Rachel Edwards rachele@osbplf.org

Free and confidential
